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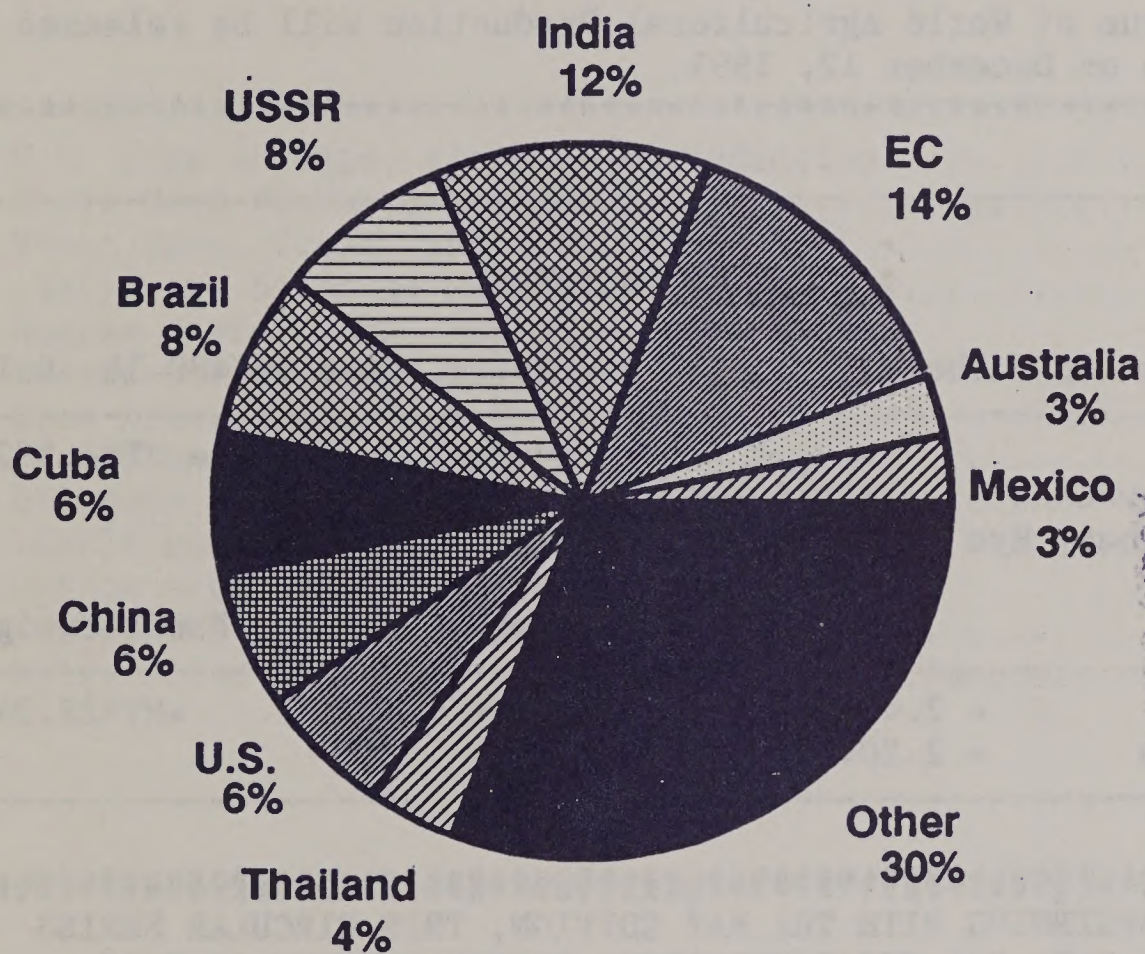


United States  
Department of  
Agriculture  
  
Foreign  
Agricultural  
Service  
  
Circular Series  
WAP 11-91  
November 1991

# World Agricultural Production

## World Centrifugal Sugar Production

### Top Producers



U.S. DEPT. OF AGRICULTURE  
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### Production Articles This Month...

- |                    |                         |
|--------------------|-------------------------|
| World Sugar        | China Livestock         |
| World Peanuts      | World Cotton            |
| World Pistachios   | World Raisins/Sultanas  |
| World Walnuts      | Latin American Forestry |
| World Dried Prunes | Oceania Forestry        |
| World Dairy        |                         |



This report draws on information from USDA's global network of agricultural attaches and counselors, official statistics of foreign governments, other foreign source materials, and results of office analysis. Estimates of U.S. acreage, yield, and production are from USDA's Agricultural Statistics Board, except where noted. Text and numbers in this report are based on unrounded data and detail may not add to totals because of rounding. This report reflects official USDA estimates released in World Agricultural Supply and Demand Estimates (WASDE-260), November 12, 1991.

This report was prepared by the Production Estimates and Crop Assessment Division (PECAD), FAS/USDA, Washington, D.C. 20250. Further information may be obtained by writing to the division or by calling (202) 720-0888 or by FAX (202) 720-8880.

\*\*\*\*\*  
 \* The next issue of World Agricultural Production will be released at 3 p.m. \*  
 \* eastern time on December 12, 1991. \*  
 \*\*\*\*\*

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:			:
:	CONVERSION TABLE		:
:			:
:	Metric Tons to Bushels	:	Metric Tons to 480-lb. Bales
:	-----	:	-----
:		:	Cotton = MT*4.592917
:	Wheat & Soybeans = MT*36.7437	:	
:	Corn, Sorghum, Rye = MT*39.36825	:	
:	Barley = MT*45.929625	:	
:	Oats = MT*68.894438	:	Metric Tons to Hundredweight
:	-----	:	-----
:	1 hectare = 2.471044 acres	:	Rice = MT*22.04622
:	1 kilogram = 2.204622 pounds	:	
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#####  
 # NOTE: BEGINNING WITH THE MAY EDITION, THIS CIRCULAR SERIES #  
 # COMBINES DATA FOR THE TERRITORIES FORMERLY KNOWN AS EAST #  
 # GERMANY (GDR) AND WEST GERMANY (FRG) UNDER THE HEADING #  
 # GERMANY. LIKEWISE, DATA FOR THE TERRITORY FORMERLY CALLED #  
 # EAST GERMANY (GDR) ARE INCLUDED IN AGGREGATES FOR THE EUROPEAN #  
 # COMMUNITY (EC-12) AND EXCLUDED FROM AGGREGATES FOR EASTERN #  
 # EUROPE. BECAUSE OF THIS, DATA FOR "GERMANY", EASTERN EUROPE, #  
 # AND THE EUROPEAN COMMUNITY (EC-12) ARE NOT COMPARABLE WITH #  
 # DATA PUBLISHED IN PRIOR EDITIONS OF THIS CIRCULAR SERIES AND #  
 # MAY NOT BE COMPARABLE WITH SUCH ESTIMATES FOUND IN OTHER #  
 # PUBLICATIONS OF THE U.S. DEPARTMENT OF AGRICULTURE. #  
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## PRODUCTION HIGHLIGHTS FOR 1991/92

November 1991

**WHEAT:** World production for 1991/92 is estimated at 547.4 million tons, down 2.9 million, or less than 1 percent from last month and down 8 percent from last year. Total foreign production is estimated at 493.5 million tons, down 2.9 million or 1 percent below last month and down 5 percent from last year. Country highlights are as follows:

- o United States Production is estimated at 53.9 million tons, unchanged from last month and down 28 percent from last year.
- o Soviet Union Production is estimated at 78.0 million tons, down 5.0 million or 6 percent from last month and down 28 percent from last year. The decrease is based on official harvest progress reports.
- o Australia Production is estimated at 10.0 million tons, down 1.0 million or 9 percent from last month and down 34 percent from last year. Yields are estimated down 9 percent owing to continued dry conditions, especially in Queensland and New South Wales.
- o China Production is estimated at 96.0 million tons, up 2.0 million or 2 percent from last month, but down 2 percent from last year's record crop. Severe flooding during the winter wheat harvest hurt production in central China, but the losses were more than offset by increases in the North China Plain and Sichuan.
- o Eastern Europe Production is estimated at 40.7 million tons, up 1.0 million or 3 percent from last month, but down 1 percent from last year. The increase is due to larger than expected production in Bulgaria.
- o Other N. Africa Production is estimated at 8.3 million tons, up 0.2 million or 3 percent from last month, and up 47 percent from 1990/91. Timely rainfall in the major growing areas of Algeria improved yields and increased production to near record levels.
- o Mexico Production is estimated at 3.7 million tons, up 0.2 million or 6 percent from last month, but down 5 percent from last year. Increased yields for both spring and winter wheat improved production prospects. Spring wheat was aided by the plentiful moisture in the Bajio region.



**COARSE GRAINS:** World production for 1991/92 is estimated at 801.5 million tons, up 1.2 million, a marginal increase from last month, but down 4 percent from last year. Total foreign production is estimated at 582.8 million tons, up 0.7 million, or less than 1 percent from last month, but down 3 percent from last year. Country highlights are as follows:

- o    United States    Production is estimated at 218.7 million tons, up 0.5 million, a slight increase from last month, but down 5 percent from last year. The increase is due to higher forecast yields for corn and sorghum.
- o    China    Production is estimated at 106.6 million tons, up 3.0 million or 3 percent from last month, but down 6 percent from last year's record crop. The revision is due to a 3 million ton increase in estimated corn production based on area information from official Chinese sources. In addition the crop was aided by good maturing and harvesting weather in the Northeast and the North China Plain.
- o    Mexico    Production is estimated at 18.0 million tons, up 1.7 million or 10 percent from last month, but down 2 percent from last year. Larger estimated harvested area for corn and better than average yields increased the corn production outlook, especially in the Bajio region.
- o    Algeria    Production is estimated at 1.6 million tons, up 0.5 million or 39 percent from last month and up 91 percent from last year. Abundant and well distributed rainfall led to record coarse grain production. Record yields more than doubled barley and oat production from last year's low levels.
- o    Eastern Europe    Production is estimated at 61.5 million tons, up 0.4 million or 1 percent from last month's estimate, and up 18 percent from last year's drought-reduced harvest. The increase is due to greater estimated production of Bulgarian corn and barley.
- o    Argentina    Production is estimated at 10.5 million tons, up 0.3 million or 3 percent from last month, but down 6 percent from last year. The increase is due to larger expected harvested area for sorghum and near average yields.
- o    Venezuela    Production is estimated at 1.8 million tons, up 0.2 million tons or 13 percent from last month, and up 16 percent from last year. Sorghum area increased due to higher domestic prices, and beneficial rains increased sorghum yield potential.



- o Soviet Union Production is estimated at 85.5 million tons, down 5.0 million or 6 percent from last month and down 25 percent from last year. The decrease is based on official harvest progress reports.
- o Australia Production is estimated at 6.9 million tons, down 0.4 million or 6 percent from last month, but up 4 percent from last year. The reduction is owing to the affects of drought on barley in northeastern growing areas. Strong barley production prospects are still forecast for the primary growing regions of South Australia, Victoria, and Western Australia.

**RICE (MILLED-BASIS):** World production for 1991/92 is estimated at 345.6 million tons, up 1.7 million or less than 1 percent from last month, but down 2 percent from last year's record crop. Total foreign production in 1991/92 is estimated at 340.6 million tons, up 1.7 million or slightly above last month, but down 6.6 million or 2 percent from 1990/91. Country highlights are as follows:

- o United States Production is estimated at 5.0 million tons, up 1 percent from last month, but down marginally from last year.
- o China Production is estimated at 129.5 million tons, up 2.1 million or 2 percent from last month, but down 2 percent from last year. Although the early rice crop was hurt by flooding in central China and drought in southern China this summer, the single and late rice crop benefited from warm and dry weather during late summer and autumn.
- o Peru Production is estimated at 0.6 million tons, up 0.1 million tons or 24 percent from last month, but down 7 percent from last year. The increase is due to larger than expected area primarily resulting from rice producers' ability to obtain financing, despite the government's tight credit policy.
- o South Korea Production is estimated at 5.3 million tons, down 0.4 million or 6 percent from last month and down 5 percent from last year. The reduction is based on lower estimated yield due to unfavorably wet and cloudy weather this summer and a decline in the area of high-yield "tongil" (indica) rice.
- o Indonesia Production is estimated at 28.7 million tons, down 0.2 million or 1 percent from last month and down 2 percent from last year. The decrease is the result of continuing drought in Java.



**OILSEEDS:** Total world oilseeds production during 1991/92 is forecast at a record 222.4 million tons, up slightly from last month and up 2 percent from 1990/91. Foreign production during 1991/92 is forecast to be a record 158.7 million tons, down 0.9 million or 1 percent from last month, but up 1 percent from last year. Total oilseed production in the United States is forecast at 63.7 million tons, up 1.0 million or 2 percent from last month and up 5 percent from last year.

- \* **Soybeans:** World production for 1991/92 is forecast at 105.3 million tons, down slightly from last month, but up 2 percent from last year. Total foreign soybean output is forecast at 51.9 million tons, down 0.8 million or 2 percent from last month and down 3 percent from 1990/91. Country highlights are as follows:

- o **United States** Production is estimated at 53.4 million tons, up 0.8 million or 1 percent from last month and up 2 percent from last year. The National Agricultural Statistics Service, USDA, increased yield projections from last month, but held expected harvested area at 23.7 million hectares, up 4 percent from 1990/91.
- o **China** Production is estimated at 10.0 million tons, down 0.8 million or 7 percent from last month and down 9 percent from last year. Farmers decreased area by an estimated 5 percent due to lower economic returns for soybeans relative to other crops. Expected yields also were reduced as a result of flooding in the Northeast and Yangtze River valley and drought in parts of Northern China.
- o **EC-12** Production is estimated at 1.7 million tons, down 0.1 million or 6 percent from last month and down 21 percent from last year. In Italy, lower estimated area and yield reduced production.

- \* **Cottonseed:** World production for 1991/92 is forecast at 34.9 million tons, up 0.2 million or 1 percent from last month and up 4 percent from last year. Total foreign production is forecast at 28.5 million tons, up marginally from last month and up 1 percent from last year. Country highlights are as follows:

- o **United States** Production is estimated at 6.4 million tons, up 0.2 million or 3 percent from last month and up 18 percent from 1990/91. Official estimates by the National Agricultural Statistics Service this month increased expected average yield and pegged harvested area at 5.5 million hectares, up 15 percent from last year.



- \* **Peanuts:** World production for 1991/92 is forecast at 23.5 million tons, up 0.1 million or less than 1 percent from last month and up 3 percent from 1990/91. Total foreign production is forecast at 21.3 million tons, up slightly from last month and last year. Country highlights are as follows:
  - o **United States** Production is estimated at a record 2.2 million tons, up marginally from last month and up 37 percent from 1990/91. The National Agricultural Statistics Service expects average yield to recover from last year's level and pegs harvested area at 795,000 hectares, up nearly 9 percent from 1990/91.
  - o **China** Production is estimated at 6.1 million tons, up 0.1 million or 2 percent from last month, but down 4 percent from last year. Very good summer and autumn weather in the most important peanut growing province of Shandong has led to higher estimated yield.
- \* **Sunflowerseed:** World production for 1991/92 is forecast at 21.4 million tons, down slightly from last month and down 4 percent from 1990/91. Total foreign production is forecast at 19.9 million tons, down slightly from last month and down 7 percent from last year. Country highlights are as follows:
  - o **United States** Production is estimated at 1.5 million tons, unchanged from last month, but up 45 percent from last year. Yield estimates 6 percent above 1990/91 are based on this season's favorable growing conditions. Harvested area is estimated at 1,025 thousand hectares, up 37 percent from 1990/91.
  - o **EC-12** Production is estimated at 4.0 million tons, down 0.1 million or 3 percent from last month and down 3 percent from last year. Lower than anticipated yields in France reduced output.
- \* **Rapeseed:** World production for 1991/92 is forecast at a record 27.2 million tons, down marginally from last month, but up 7 percent from last year. Total foreign production is forecast at 27.1 million tons, down marginally from last month, but up 7 percent from last year. Country highlights are as follows:
  - o **United States** Production is estimated at 105,000 tons, unchanged from last month, but nearly double that of last year. Area and production data for 1987/88 through the initial 1991/92 estimate, are estimates from the Inter-agency Oilseeds Committee and the World Agricultural Outlook Board. The National Agricultural Statistics Service, USDA, is expected to announce its U.S. rapeseed area estimates in January 1992.



- \* **Flaxseed:** World production for 1991/92 is forecast at 2.0 million tons, unchanged last month, but down 12 percent from last year. While production in the United States is small, this year's output is expected to increase by 18 percent over last year, to 114,000 tons. Total foreign production is pegged at 1.9 million tons, down 13 percent from 1990/91. There were no significant country changes this month.
- \* **Copra:** World production for 1991/92 is forecast at 4.6 million tons, down 0.1 million or 2 percent from last month and down 3 percent from last year. Copra production reached a record 5.3 million tons in 1985/86. Country highlights are as follows:
  - o **Indonesia** Production is estimated at 1.3 million tons, down 0.1 million or 9 percent from last month and down 2 percent from last year. The lingering drought, especially in North Salawesi, cut yield estimates.
- \* **Palm Kernels:** World production for 1991/92 is forecast at a record 3.6 million tons, unchanged from last month, but up 9 percent from last year. There were no country changes this month.
- \* **Palm Oil:** World production for 1991/92 is forecast at a record 11.9 million tons, unchanged from last month, but up 8 percent from last year. There were no country changes this month.

**COTTON:** World cotton production in 1991/92 is estimated at a record 91.6 million bales. This estimate is up 0.9 million bales or slightly less than 1 percent from last month and up 4.6 million bales or 5 percent from 1990/91 and up from the previous record of 89 million bales harvested in 1984/85. Total foreign production is estimated at 73.4 million bales, up 0.3 million bales or less than 1 percent from last month and is a gain of 3 percent over 1990/91 and second only to the 1984/85 record crop of 76 million bales. Country highlights are as follows:

- o **United States** Production is estimated at 18.2 million bales, up 0.6 million or 3 percent from last month and a gain of 18 percent from last year. If realized, this will be the largest crop since 1937/38 when output hit 18.9 million bales. Mostly clear weather has favored cotton quality and harvesting across the Texas Plains, the southwest, and the southeast.
- o **Argentina** Production is estimated at a record 1.5 million bales, up 0.2 million or 15 percent from last month, and up 7 percent from last year. Cotton is the most profitable crop in the northern Argentine provinces of Chaco and Formosa. Early favorable weather has improved sowing conditions in these provinces.







TABLE 2

## World Crop Production Summary

Commodity	World	Total Foreign	North America			Europe			USSR	Asia				South America		Selected Other			All Other Countries		
			United States			Canada	Mexico	EC-12		Oth. W. Europe	Eastern Europe	China	India	Indonesia	Pakistan	Thailand	Argentina	Brazil		Australia	South Africa
—Million Metric Tons—																					
Wheat 1989/90 1990/91 prel. 1991/92 proj. October November	537.9	482.4	55.4	24.6	4.0	82.0	4.4	40.7	92.3	90.8	54.1	0.0	14.4	0.0	10.2	5.6	14.2	2.0	12.5	15.4	
	593.3	518.8	74.5	32.7	3.9	84.7	5.1	41.1	108.0	98.2	49.7	0.0	14.3	0.0	10.5	3.2	15.1	1.7	15.0	17.7	
	550.3	496.4	53.9	33.0	3.5	90.3	4.1	39.7	83.0	94.0	54.0	0.0	14.5	0.0	9.0	3.2	11.0	2.1	16.0	18.1	
	547.4	493.5	53.9	33.0	3.7	90.3	4.0	40.7	78.0	96.0	54.0	0.0	14.5	0.0	9.0	3.2	10.0	2.1	16.0	18.1	
Coarse Grains 1989/90 1990/91 prel. 1991/92 proj. October November	802.6	581.3	221.4	23.5	14.1	89.8	12.4	60.2	104.8	93.5	34.6	5.0	2.7	4.3	8.3	22.5	6.8	9.5	7.5	81.7	
	834.0	603.4	230.7	26.1	18.4	84.1	13.7	52.2	113.3	113.5	33.3	5.2	2.9	4.1	11.2	24.2	6.7	8.8	8.9	77.0	
	800.3	582.1	218.3	23.5	16.3	88.2	11.9	61.1	90.5	103.6	31.5	5.2	2.5	4.0	10.2	26.7	7.3	8.6	9.7	81.3	
	801.5	582.8	218.7	23.5	18.0	88.2	12.0	61.5	85.5	106.6	31.5	5.2	2.5	4.0	10.5	26.7	6.9	8.6	9.7	81.9	
Rice (Milled) 1989/90 1990/91 prel. 1991/92 proj. October November	344.5	339.4	5.1	0.0	0.4	1.4	0.0	0.1	1.7	126.1	74.1	29.1	3.2	13.3	0.2	4.9	0.6	0.0	0.2	23.2	
	352.2	347.2	5.1	0.0	0.2	1.6	0.0	0.1	1.6	132.5	74.6	29.4	3.3	11.4	0.2	6.3	0.6	0.0	0.2	23.7	
	343.9	338.9	5.0	0.0	0.2	1.5	0.0	0.1	1.4	127.4	71.5	28.9	3.3	13.2	0.2	6.8	0.8	0.0	0.1	23.1	
	345.6	340.6	5.0	0.0	0.2	1.5	0.0	0.1	1.4	129.5	71.5	28.7	3.3	13.2	0.2	6.8	0.8	0.0	0.1	23.2	
Total Grains 1/ 1989/90 1990/91 prel. 1991/92 proj. October November	1,685.0	1,403.2	281.9	48.0	18.5	173.2	16.8	101.0	198.8	310.4	162.7	34.1	20.4	17.6	18.7	33.0	21.7	11.5	20.2	196.7	
	1,779.6	1,469.4	310.2	58.8	22.5	170.4	18.7	93.5	222.9	344.2	157.5	34.6	20.4	15.5	22.0	33.7	22.3	10.5	24.1	197.9	
	1,694.5	1,417.3	277.2	56.5	20.0	180.1	16.0	100.9	174.9	325.0	157.0	34.1	20.3	17.2	19.4	36.7	19.1	10.7	25.9	203.6	
	1,694.6	1,416.9	277.7	56.5	21.9	179.9	16.0	102.4	164.9	332.1	157.0	33.9	20.3	17.2	19.7	36.7	17.7	10.7	25.9	204.2	
Oilseeds 2/ 1989/90 1990/91 prel. 1991/92 proj. October November	214.1	154.8	59.3	4.9	1.4	11.5	0.7	5.2	13.8	28.5	19.3	2.2	3.3	0.9	15.8	21.8	0.8	1.0	2.3	21.5	
	217.4	156.7	60.6	5.6	1.0	13.0	0.7	4.3	13.0	33.2	21.0	2.2	3.6	0.7	16.1	17.0	2.0	1.0	1.9	20.2	
	222.4	159.7	62.8	6.2	1.1	13.8	0.7	4.2	12.1	33.2	21.5	2.2	3.8	0.7	15.5	19.1	1.1	1.0	1.6	22.1	
	222.4	158.7	63.7	6.2	1.1	13.6	0.7	4.2	12.1	32.5	21.5	2.2	3.8	0.7	15.5	19.1	1.0	1.0	1.6	21.9	
—Million 480-Pound Bales—																					
Cotton 1989/90 1990/91 prel. 1991/92 proj. October November	80.0	67.8	12.2	0.0	0.8	1.5	0.0	0.1	12.3	17.4	10.6	0.0	6.7	0.1	1.3	3.0	1.4	0.3	2.8	9.5	
	87.0	71.5	15.5	0.0	0.8	1.4	0.0	0.1	12.0	20.7	9.1	0.0	7.5	0.1	1.4	3.1	1.9	0.2	3.0	10.1	
	90.7	73.1	17.6	0.0	0.9	1.2	0.0	0.1	11.0	22.0	10.0	0.0	7.8	0.2	1.3	3.5	1.9	0.3	2.7	10.2	
	91.6	73.4	18.2	0.0	0.9	1.3	0.0	0.1	11.0	22.0	10.0	0.0	7.8	0.2	1.5	3.5	1.9	0.3	2.7	10.3	

1/ Includes total of wheat, coarse grains, and rice (milled) shown above. Estimates of Soviet total grain production, including wheat, coarse grains, rice (rough), minor grains and pulses are 210.9 million tons in 1989/90, 235.0 million in 1990/91, and 175.0 million forecast in 1991/92.

2/ Totals for major regions and countries include the six major oilseeds shown elsewhere in this report, while world and total foreign also includes copra and palm kernels for all countries.

Note: Entries of 0.0 indicate no reported or insignificant production.

November 1991

Production Estimates and Crop Assessment Division, FAS, USDA



TABLE 3

## Wheat Area, Yield, and Production World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1989/90	Proj. 1990/91	Proj. 1991/92	Prel. 1989/90	1991/92 Oct.	Proj. Nov.		Prel. 1989/90	1991/92 Oct.	Proj. Nov.	
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	226.5	232.1	223.5	2.38	2.56	2.47	2.45	537.9	593.3	550.3	547.4
United States	25.2	28.0	23.3	2.20	2.66	2.31	2.31	55.4	74.5	53.9	53.9
Total Foreign	201.3	204.1	200.1	2.40	2.54	2.49	2.47	482.4	518.8	496.4	493.5
Maj. Foreign Exporters	45.1	45.8	44.2	2.91	3.12	3.24	3.22	131.0	143.0	143.3	142.3
Argentina	5.5	5.7	4.9	1.86	1.84	1.84	1.84	10.2	10.5	9.0	9.0
Australia	9.0	9.2	7.8	1.58	1.63	1.41	1.28	14.2	15.1	11.0	10.0
Canada	13.6	14.4	14.7	1.80	2.27	2.24	2.24	24.6	32.7	33.0	33.0
EC-12	17.0	16.5	16.7	4.83	5.14	5.39	5.39	82.0	84.7	90.3	90.3
Major Importers	96.6	98.4	95.8	2.48	2.66	2.46	2.42	239.1	261.4	233.6	231.7
Brazil	3.4	3.3	2.4	1.65	0.97	1.33	1.33	5.6	3.2	3.2	3.2
China	29.8	30.8	30.9	3.04	3.19	3.06	3.10	90.8	98.2	94.0	96.0
Eastern Europe	9.8	9.7	9.9	4.14	4.22	4.05	4.11	40.7	41.1	39.7	40.7
Egypt	0.6	0.7	0.8	5.05	5.79	6.40	6.40	3.2	4.3	4.8	4.8
Other N. Africa 1/	5.0	5.4	5.6	1.14	1.04	1.55	1.50	5.6	5.7	8.1	8.3
Japan	0.3	0.3	0.2	3.47	3.66	3.51	2.93	1.0	1.0	0.9	0.7
USSR	47.7	48.2	46.0	1.94	2.24	1.80	1.70	92.3	108.0	83.0	78.0
Other Foreign	59.7	59.9	60.2	1.88	1.91	1.98	1.99	112.3	114.4	119.4	119.5
India	24.1	23.5	24.3	2.24	2.12	2.22	2.22	54.1	49.7	54.0	54.0
Iran	6.8	6.5	6.2	0.81	1.08	1.15	1.15	5.5	7.0	7.1	7.1
Mexico	1.0	1.0	0.9	4.21	4.11	3.98	4.20	4.0	3.9	3.5	3.7
Non-EC W. Europe	0.8	0.9	0.8	5.18	5.41	5.19	5.18	4.4	5.1	4.1	4.0
Pakistan	7.7	7.8	8.0	1.87	1.82	1.82	1.82	14.4	14.3	14.5	14.5
South Africa	1.8	1.6	1.4	1.11	1.10	1.48	1.48	2.0	1.7	2.1	2.1
Turkey	8.7	8.8	8.9	1.44	1.71	1.80	1.80	12.5	15.0	16.0	16.0
Others	8.7	9.9	9.8	1.77	1.80	1.84	1.84	15.4	17.7	18.1	18.1

1/ Algeria, Libya, Morocco, and Tunisia.

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TABLE 4  
Coarse Grains Area, Yield, and Production  
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1989/90	Proj. 1990/91	Proj. 1991/92	Prel. 1989/90	1991/92 1990/91	Proj. Oct.	Proj. Nov.	Prel. 1989/90	1991/92 1990/91	Proj. Oct.	Proj. Nov.
<b><u>TOTAL COARSE GRAINS</u></b>	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World 1/	323.0	318.1	321.6	2.48	2.62	2.50	2.49	802.6	834.0	800.3	801.5
United States	37.0	36.4	37.3	5.98	6.34	5.86	5.87	221.4	230.7	218.3	218.7
Total Foreign	286.0	281.7	284.3	2.03	2.14	2.06	2.05	581.3	603.4	582.1	582.8
Maj. Foreign Exporters	21.1	20.5	21.4	2.49	2.77	2.51	2.50	52.5	56.8	53.6	53.5
Argentina	3.2	3.3	3.7	2.64	3.43	2.86	2.88	8.3	11.2	10.2	10.5
Australia	3.9	4.1	4.8	1.75	1.64	1.53	1.45	6.8	6.7	7.3	6.9
Canada	8.3	7.9	7.4	2.84	3.30	3.15	3.15	23.5	26.1	23.5	23.5
South Africa	4.2	3.8	4.0	2.24	2.34	2.15	2.15	9.5	8.8	8.6	8.6
Thailand	1.6	1.5	1.5	2.78	2.65	2.65	2.65	4.3	4.1	4.0	4.0
Major Importers	103.8	99.8	101.4	2.73	2.84	2.67	2.63	282.9	283.2	269.5	266.7
Eastern Europe	16.5	15.9	16.2	3.66	3.28	3.80	3.81	60.2	52.2	61.1	61.5
EC-12	20.3	19.3	19.2	4.43	4.35	4.60	4.60	89.8	84.1	88.2	88.2
Other W. Europe	3.1	3.0	2.9	3.98	4.49	4.17	4.19	12.4	13.7	11.9	12.0
Mexico	7.5	8.2	8.6	1.88	2.23	1.94	2.09	14.1	18.4	16.3	18.0
USSR	56.0	52.9	54.2	1.87	2.14	1.67	1.58	104.8	113.3	90.5	85.5
Other Major Import. 2/	0.4	0.4	0.4	3.83	3.63	3.70	3.70	1.6	1.5	1.5	1.5
Other Foreign	161.0	161.3	161.5	1.53	1.63	1.61	1.63	245.8	263.4	259.0	262.6
Brazil	12.5	13.5	13.5	1.79	1.79	1.98	1.98	22.5	24.2	26.7	26.7
China	28.2	29.1	29.1	3.31	3.90	3.62	3.66	93.5	113.5	103.6	106.6
India	37.7	36.8	36.7	0.92	0.90	0.86	0.86	34.6	33.3	31.5	31.5
Indonesia	2.7	2.9	2.9	1.85	1.82	1.79	1.79	5.0	5.2	5.2	5.2
Nigeria	9.9	9.5	9.9	0.82	0.67	0.84	0.84	8.1	6.3	8.3	8.3
Philippines	3.6	3.9	3.9	1.22	1.32	1.24	1.24	4.4	5.1	4.9	4.9
Turkey	4.4	4.5	4.5	1.70	1.99	2.17	2.17	7.5	8.9	9.7	9.7
Others	61.9	61.2	61.0	1.14	1.09	1.14	1.14	70.3	67.0	69.1	69.8
<b><u>BARLEY</u></b>											
World	74.9	75.2	77.5	2.27	2.48	2.26	2.20	170.1	186.5	174.6	170.9
United States	3.4	3.0	3.4	2.62	3.02	2.97	2.97	8.8	9.2	10.1	10.1
Total Foreign	71.5	72.1	74.1	2.26	2.46	2.23	2.17	161.3	177.3	164.5	160.7
Australia	2.3	2.5	2.8	1.75	1.62	1.50	1.39	4.0	4.1	4.2	3.9
Canada	4.7	4.8	4.7	2.50	2.97	2.79	2.79	11.7	14.2	13.0	13.0
China	3.3	3.3	3.3	1.74	1.73	1.73	1.73	5.7	5.7	5.7	5.7
Eastern Europe	3.6	3.6	3.8	4.03	4.00	3.84	3.84	14.5	14.3	14.4	14.5
EC-12	12.6	12.3	12.1	4.05	4.12	4.19	4.20	51.0	50.8	50.8	50.9
Other W. Europe	1.5	1.5	1.5	3.87	4.36	3.91	3.90	5.9	6.4	5.9	6.0
Turkey	3.4	3.4	3.4	1.46	1.76	2.00	2.00	4.9	6.0	6.8	6.8
USSR	27.6	26.1	28.5	1.75	2.34	1.65	1.51	48.5	61.0	47.0	43.0
Others	12.6	14.7	14.0	1.20	1.01	1.20	1.21	15.1	14.8	16.6	17.0

FOOTNOTES AT END OF TABLE

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TABLE 4  
Coarse Grains Area, Yield, and Production  
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1989/90	Proj. 1990/91	1991/92	Prel. 1989/90	1991/92 1990/91	Oct.	Nov.	Prel. 1989/90	1991/92 1990/91	Oct.	Nov.
<b><u>CORN</u></b>	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	126.5	127.3	130.5	3.66	3.76	3.65	3.67	462.5	479.2	473.1	478.4
United States	26.2	27.1	27.8	7.30	7.44	6.83	6.84	191.2	201.5	190.0	190.2
Total Foreign	100.3	100.2	102.7	2.70	2.77	2.78	2.81	271.3	277.7	283.2	288.2
Maj. Foreign Exporters	6.6	6.3	6.8	2.77	3.14	2.79	2.79	18.2	19.8	18.9	18.9
Argentina	1.7	2.0	2.2	3.06	4.00	3.27	3.27	5.2	7.8	7.2	7.2
South Africa	3.5	3.0	3.3	2.56	2.73	2.46	2.46	8.9	8.2	8.0	8.0
Thailand	1.4	1.4	1.3	2.93	2.81	2.80	2.80	4.1	3.8	3.7	3.7
Major Importers	21.2	19.7	21.5	3.93	3.50	3.90	3.94	83.4	68.9	82.7	84.8
Eastern Europe	7.1	6.5	6.6	4.14	3.26	4.69	4.69	29.2	21.1	30.5	30.9
EC-12	3.9	3.4	3.9	6.91	6.27	6.72	6.71	26.9	21.6	26.2	26.1
Other W. Europe	0.2	0.2	0.2	7.83	7.98	7.93	8.34	1.8	1.8	1.8	1.8
Mexico	5.8	6.6	7.2	1.68	2.14	1.83	2.01	9.8	14.1	12.8	14.5
USSR	4.1	2.8	3.5	3.71	3.50	3.14	3.14	15.3	9.8	11.0	11.0
Other Maj. Import. 2/	0.1	0.1	0.1	4.28	4.10	4.18	4.18	0.5	0.5	0.5	0.5
Other Foreign	72.5	74.2	74.4	2.34	2.55	2.46	2.48	169.7	189.0	181.5	184.5
Brazil	12.1	13.0	13.0	1.80	1.81	2.00	2.00	21.8	23.5	26.0	26.0
Canada	1.0	1.0	1.1	6.36	6.91	6.06	6.06	6.4	7.2	6.6	6.6
China	20.4	21.4	21.5	3.88	4.52	4.19	4.23	78.9	96.8	88.0	91.0
Egypt	0.8	0.8	0.9	5.37	5.43	5.59	5.59	4.5	4.6	4.8	4.8
India	5.9	6.1	5.7	1.61	1.54	1.47	1.47	9.4	9.4	8.4	8.4
Indonesia	2.7	2.9	2.9	1.85	1.82	1.79	1.79	5.0	5.2	5.2	5.2
Philippines	3.6	3.9	3.9	1.22	1.32	1.24	1.24	4.4	5.1	4.9	4.9
Zimbabwe	1.2	1.1	1.2	1.72	1.45	1.67	1.67	2.0	1.6	2.0	2.0
Others	24.9	24.1	24.3	1.50	1.48	1.47	1.47	37.3	35.6	35.7	35.7
<b><u>SORGHUM</u></b>											
World	41.7	39.2	39.9	1.32	1.35	1.31	1.33	55.0	53.1	52.3	53.0
United States	4.5	3.7	3.9	3.48	3.95	3.65	3.73	15.6	14.5	14.4	14.7
Total Foreign	37.2	35.5	36.0	1.06	1.09	1.06	1.06	39.4	38.5	37.9	38.3
Argentina	0.7	0.7	0.8	2.86	3.57	2.86	2.95	2.0	2.5	2.0	2.3
Australia	0.4	0.4	0.6	2.27	2.22	1.92	1.75	0.9	0.9	1.1	1.0
China	1.6	1.5	1.5	2.72	3.71	3.47	3.47	4.4	5.7	5.2	5.2
India	14.9	14.8	15.0	0.86	0.82	0.80	0.80	12.9	12.1	12.0	12.0
Mexico	1.3	1.3	1.1	2.88	2.85	2.73	2.73	3.8	3.7	3.0	3.0
Nigeria	4.4	4.4	4.4	0.80	0.64	0.80	0.80	3.5	2.8	3.5	3.5
South Africa	0.2	0.2	0.2	1.11	1.12	1.11	1.11	0.3	0.2	0.3	0.3
Sudan	4.0	3.0	3.0	0.45	0.50	0.50	0.50	1.8	1.5	1.5	1.5
Thailand	0.2	0.2	0.2	1.44	1.39	1.47	1.47	0.2	0.3	0.3	0.3
Others	9.4	9.0	9.2	1.02	0.98	0.99	1.00	9.6	8.9	9.1	9.3

FOOTNOTES AT END OF TABLE

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TABLE 4  
Coarse Grains Area, Yield, and Production  
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1989/90	Proj. 1990/91	Proj. 1991/92	Prel. 1989/90	1990/91	1991/92 Proj. Oct.	Nov.	Prel. 1989/90	1990/91	1991/92 Proj. Oct.	Nov.
<b>OATS</b>	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	22.6	21.3	20.5	1.84	1.98	1.71	1.71	41.4	42.2	35.1	35.1
United States	2.8	2.4	1.9	1.95	2.16	1.81	1.81	5.4	5.2	3.5	3.5
Total Foreign	19.8	18.9	18.6	1.82	1.96	1.70	1.70	36.0	37.0	31.6	31.6
USSR	10.8	10.7	10.7	1.57	1.68	1.36	1.36	16.8	18.0	14.5	14.5
Maj. Foreign Exporters	3.6	2.9	3.0	2.00	2.16	2.00	2.00	7.3	6.4	6.0	6.0
Argentina	0.4	0.3	0.4	1.44	1.34	1.29	1.29	0.6	0.4	0.5	0.5
Australia	1.1	1.1	1.3	1.51	1.43	1.38	1.38	1.6	1.5	1.8	1.8
Canada	1.7	1.2	1.0	2.08	2.34	2.32	2.32	3.5	2.9	2.3	2.3
Sweden	0.4	0.4	0.3	3.54	4.42	4.09	4.09	1.5	1.6	1.4	1.4
Other Foreign	5.4	5.3	4.9	2.21	2.40	2.27	2.28	11.9	12.6	11.1	11.1
China	0.6	0.6	0.6	1.20	1.21	1.18	1.18	0.7	0.7	0.7	0.7
Eastern Europe	1.2	1.2	1.2	2.55	2.70	2.55	2.55	3.2	3.3	3.0	3.0
Czechoslovakia	0.1	0.1	0.1	3.24	4.55	4.00	4.00	0.3	0.4	0.4	0.4
Poland	0.8	0.7	0.7	2.72	2.84	2.67	2.67	2.2	2.1	1.9	1.9
EC-12	1.8	1.6	1.4	2.74	3.07	3.07	3.06	4.8	5.1	4.4	4.4
France	0.3	0.2	0.2	3.73	3.86	3.81	3.81	1.0	0.9	0.8	0.8
Germany	0.6	0.6	0.4	3.58	3.93	4.92	4.92	2.0	2.4	1.9	1.9
Finland	0.4	0.5	0.3	3.24	3.67	3.23	3.23	1.4	1.7	1.1	1.1
Norway	0.1	0.1	0.1	3.13	4.58	4.00	4.00	0.4	0.6	0.5	0.5
Others	1.3	1.3	1.2	1.11	1.09	1.12	1.16	1.4	1.4	1.4	1.4
<b>RYE</b>											
World	16.9	16.6	13.9	2.22	2.33	2.16	2.09	37.6	38.7	30.2	29.1
United States	0.2	0.2	0.2	1.77	1.70	1.55	1.55	0.3	0.3	0.2	0.2
Total Foreign	16.7	16.5	13.8	2.23	2.34	2.17	2.10	37.2	38.5	29.9	28.9
USSR	10.7	10.4	8.5	1.87	2.02	1.71	1.59	20.1	21.0	14.5	13.5
Maj. Foreign Exporter											
Canada	0.5	0.4	0.2	1.74	1.68	1.78	1.78	0.9	0.7	0.4	0.4
Other Foreign											
Eastern Europe	3.3	3.4	3.4	2.94	2.88	2.82	2.82	9.7	9.9	9.5	9.5
Hungary	0.1	0.1	0.1	2.06	2.46	2.40	2.40	0.2	0.2	0.2	0.2
Poland	2.9	3.1	3.0	2.95	2.86	2.82	2.82	8.6	8.8	8.5	8.5
Czechoslovakia	0.2	0.2	0.2	4.05	4.26	3.82	3.82	0.7	0.7	0.7	0.7
EC-12	1.6	1.6	1.2	3.32	3.40	3.65	3.65	5.2	5.4	4.5	4.5
Denmark	0.1	0.1	0.1	4.82	4.95	4.57	4.57	0.5	0.5	0.4	0.4
Germany	1.0	1.0	0.7	3.86	3.87	4.66	4.66	3.9	4.0	3.3	3.3
Others	0.6	0.6	0.5	2.29	2.38	2.21	2.20	1.3	1.5	1.0	1.0

1/ Total of barley, corn, sorghum, oats, and rye shown below, plus millet and mixed grain.

2/ Japan, Republic of Korea, and Taiwan.

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TABLE 5

# Rice Area, Yield, and Production

## World and Selected Countries and Regions

	AREA		YIELD			PRODUCTION (Rough Basis)			MILLING RATE			PRODUCTION (Milled Basis)		
	Prel. 1989/90	Proj. 1991/92	1989/90	1990/91	1991/92 Proj. Oct. Nov.	1989/90	1990/91	1991/92 Proj. Oct. Nov.	1989/90	1990/91	1991/92 Proj. Oct. Nov.	1989/90	1990/91	1991/92 Proj. Oct. Nov.
	—Million Hectares—		—Metric Tons Per Hectare—			—Million Metric Tons—			—In Percent—			—Million Metric Tons—		
World	146.4	147.1	146.0			508.6	519.8	507.6	510.1	67.7	67.8	67.7	67.7	67.7
United States	1.1	1.1	1.1			7.0	7.0	7.2	7.2	72.6	72.0	70.0	70.0	70.0
Total Foreign	145.3	145.9	144.8			501.6	512.7	500.5	502.9	67.7	67.7	67.7	67.5	67.5
Maj. Foreign Exporters	16.8	16.6	16.6			38.5	35.9	37.6	37.6	64.0	63.8	64.1	64.1	64.1
Burma	4.7	4.8	4.5			13.5	13.7	12.6	12.6	60.0	60.0	60.0	60.0	60.0
Pakistan	2.1	2.1	2.1			4.8	4.9	5.0	5.0	66.7	66.7	66.7	66.7	66.7
Thailand	10.0	9.7	10.0			20.2	17.3	20.0	20.0	66.0	66.0	66.0	66.0	66.0
Major Importers	13.9	13.9	13.5			58.6	58.4	57.7	56.9	66.1	66.0	66.1	66.0	66.0
EC-12	0.3	0.4	0.4			2.1	2.4	2.3	2.2	67.0	67.4	67.3	67.3	67.3
Indonesia	10.5	10.5	10.1			44.7	45.2	44.4	44.1	65.0	65.0	65.0	65.0	65.0
Nigeria	0.6	0.7	0.7			0.9	0.9	0.9	0.9	60.0	60.0	60.0	60.0	60.0
Republic of Korea	1.3	1.2	1.2			8.1	7.7	7.8	7.4	72.8	72.5	72.7	72.5	72.5
Other Maj. Import. 1/	1.2	1.1	1.1			2.8	2.2	2.2	2.2	65.5	65.4	65.8	65.8	65.8
Other Foreign	114.6	115.4	114.7			404.5	418.5	405.3	408.5	68.3	68.3	68.3	68.3	68.3
Australia	0.1	0.1	0.1			0.8	0.8	1.1	1.1	71.5	71.5	71.5	71.5	71.5
Bangladesh	10.5	10.4	10.5			26.8	26.9	27.6	27.6	66.7	66.7	66.7	66.7	66.7
Brazil	4.3	4.5	5.3			7.2	9.3	10.0	10.0	68.0	68.0	68.0	68.0	68.0
China	32.7	33.1	32.8			180.1	189.3	182.0	185.0	70.0	70.0	70.0	70.0	70.0
India	42.2	42.6	41.1			111.1	111.9	107.3	107.3	66.7	66.7	66.7	66.7	66.7
Japan	2.1	2.1	2.1			12.9	13.1	12.9	12.9	72.8	72.8	72.8	72.8	72.8
Philippines	3.4	3.4	3.3			8.9	9.9	9.3	9.3	65.0	65.0	65.0	65.0	65.0
USSR	0.7	0.6	0.6			2.6	2.4	2.2	2.2	65.0	65.0	65.0	65.0	65.0
Vietnam	5.7	5.7	5.9			19.0	19.0	18.0	18.0	66.0	66.0	66.0	66.0	66.0
Others	12.9	13.0	12.9			35.0	35.8	34.9	35.1	66.1	66.2	66.2	66.2	66.2

1/ Hong Kong, Iran, Iraq, Ivory Coast, and Saudi Arabia.

November 1991

Production Estimates and Crop Assessment Division, FAS, USDA



**TABLE 6**  
**Oilseeds Area, Yield, and Production**  
**World and Selected Countries and Regions**

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel.	Proj.		Prel.	1991/92 Proj.			Prel.	1991/92 Proj.		
	1989/90	1990/91	1991/92	1989/90	1990/91	Oct.	Nov.	1989/90	1990/91	Oct.	Nov.
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
<u>SOYBEANS</u>											
World	58.26	54.05	55.39	1.84	1.91	1.89	1.90	107.27	103.03	105.36	105.28
United States	24.09	22.87	23.73	2.17	2.29	2.22	2.25	52.35	52.42	52.62	53.39
Total Foreign	34.16	31.18	31.66	1.61	1.62	1.65	1.64	54.92	50.61	52.73	51.89
Maj. Foreign Exporters	16.35	14.40	15.00	1.90	1.83	1.88	1.88	31.09	26.30	28.25	28.25
Argentina	4.95	4.75	5.00	2.17	2.27	2.15	2.15	10.75	10.80	10.75	10.75
Brazil	11.40	9.65	10.00	1.78	1.61	1.75	1.75	20.34	15.50	17.50	17.50
Other Foreign	17.81	16.78	16.66	1.34	1.45	1.44	1.42	23.83	24.31	24.48	23.64
Canada	0.54	0.49	0.58	2.26	2.64	2.14	2.14	1.22	1.29	1.23	1.23
China	8.06	7.56	7.20	1.27	1.46	1.44	1.39	10.23	11.00	10.80	10.00
Eastern Europe	0.70	0.34	0.25	0.97	1.07	1.30	1.35	0.68	0.36	0.36	0.33
EC-12	0.63	0.69	0.55	3.13	3.12	3.14	3.11	1.98	2.17	1.81	1.71
India	2.13	2.39	2.65	0.80	1.02	1.02	1.02	1.72	2.44	2.70	2.70
Indonesia	1.21	1.22	1.24	1.09	1.08	1.04	1.04	1.32	1.32	1.29	1.29
Paraguay	0.98	0.89	0.90	1.61	1.46	1.78	1.78	1.58	1.30	1.60	1.60
USSR	0.83	0.83	0.81	1.15	1.06	1.14	1.14	0.96	0.88	0.92	0.92
Others	2.74	2.37	2.49	1.52	1.50	1.56	1.55	4.17	3.56	3.78	3.86
<u>COTTONSEED</u>											
World	32.27	33.27	34.34	0.96	1.01	1.01	1.02	30.95	33.55	34.69	34.90
United States	3.86	4.75	5.46	1.10	1.14	1.14	1.17	4.24	5.41	6.18	6.38
Total Foreign	28.41	28.53	28.88	0.94	0.99	0.99	0.99	26.71	28.14	28.51	28.52
China	5.20	5.59	6.00	1.24	1.37	1.36	1.36	6.44	7.66	8.16	8.16
India	7.53	7.36	7.27	0.58	0.53	0.59	0.59	4.40	3.90	4.30	4.30
Pakistan	2.60	2.69	2.78	1.12	1.21	1.23	1.23	2.91	3.27	3.40	3.40
USSR	3.33	3.15	3.01	1.53	1.56	1.46	1.46	5.11	4.92	4.40	4.40
Others	9.74	9.74	9.83	0.81	0.86	0.83	0.84	7.85	8.38	8.25	8.26
<u>PEANUTS</u>											
World	19.81	20.01	20.21	1.11	1.14	1.15	1.16	22.05	22.88	23.42	23.51
United States	0.67	0.73	0.80	2.72	2.23	2.82	2.82	1.81	1.63	2.24	2.24
Total Foreign	19.15	19.28	19.41	1.06	1.10	1.08	1.10	20.24	21.25	21.18	21.27
Argentina	0.18	0.20	0.19	1.87	2.37	2.11	2.11	0.34	0.48	0.40	0.40
China	2.96	2.91	2.92	1.81	2.19	1.99	2.09	5.37	6.37	6.00	6.10
India	8.71	8.65	8.70	0.93	0.93	0.94	0.94	8.09	8.08	8.20	8.20
Senegal	0.78	0.92	0.90	1.04	0.73	0.77	0.77	0.82	0.67	0.70	0.70
South Africa	0.09	0.09	0.09	1.28	1.59	1.50	1.50	0.11	0.14	0.14	0.14
Sudan	0.55	0.54	0.53	0.73	0.60	0.75	0.75	0.40	0.33	0.40	0.40
Others	5.88	5.98	6.08	0.87	0.87	0.88	0.88	5.13	5.19	5.35	5.34



TABLE 6  
Oilseeds Area, Yield, and Production  
World and Selected Countries and Regions --- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel.		Proj.	Prel.		1991/92 Proj.		Prel.		1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	Oct.	Nov.	1989/90	1990/91	Oct.	Nov.
<u>SUNFLOWERSEED</u>	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	15.88	16.25	16.40	1.38	1.37	1.31	1.30	21.87	22.29	21.43	21.36
United States	0.72	0.75	1.02	1.10	1.38	1.46	1.46	0.80	1.03	1.50	1.50
Total Foreign	15.16	15.50	15.37	1.39	1.37	1.30	1.29	21.07	21.26	19.93	19.86
Argentina	2.80	2.30	2.50	1.36	1.70	1.40	1.40	3.80	3.90	3.50	3.50
China	0.72	0.70	0.71	1.49	1.71	1.62	1.62	1.06	1.20	1.15	1.15
EC-12	2.13	2.55	2.39	1.67	1.62	1.71	1.67	3.54	4.13	4.10	3.99
East Europe	1.27	1.23	1.20	1.81	1.70	1.77	1.78	2.29	2.09	2.08	2.15
USSR	4.46	4.67	4.60	1.59	1.41	1.30	1.30	7.07	6.56	6.00	6.00
Others	3.80	4.06	3.97	0.87	0.83	0.78	0.77	3.32	3.38	3.11	3.07
<u>RAPESEED</u>											
World	17.12	18.24	19.90	1.28	1.39	1.37	1.37	21.85	25.37	27.23	27.22
United States 1/	0.03	0.03	0.06	1.58	1.74	1.75	1.75	0.05	0.05	0.11	0.11
Total Foreign	17.09	18.21	19.84	1.28	1.39	1.36	1.37	21.80	25.32	27.12	27.12
Canada	2.90	2.58	3.27	1.07	1.27	1.28	1.28	3.10	3.28	4.20	4.20
China	4.99	5.50	6.10	1.09	1.26	1.16	1.16	5.44	6.96	7.10	7.10
EC-12	1.81	2.13	2.43	2.96	2.89	3.00	3.00	5.34	6.14	7.29	7.29
East Europe	0.81	0.74	0.69	2.66	2.38	2.41	2.41	2.15	1.75	1.66	1.66
India	4.99	5.72	5.70	0.83	0.94	0.88	0.88	4.12	5.40	5.00	5.00
Others	1.59	1.54	1.66	1.04	1.16	1.10	1.13	1.65	1.78	1.88	1.87
<u>FLAXSEED</u>											
World	3.74	3.76	3.38	0.50	0.61	0.60	0.60	1.85	2.30	2.02	2.02
United States	0.07	0.10	0.12	0.47	0.95	0.97	0.97	0.03	0.10	0.11	0.11
Total Foreign	3.67	3.66	3.26	0.50	0.60	0.58	0.58	1.82	2.20	1.90	1.90
Argentina	0.58	0.58	0.42	0.90	0.83	0.86	0.86	0.52	0.48	0.36	0.36
Canada	0.60	0.73	0.54	0.83	1.29	1.30	1.30	0.50	0.94	0.70	0.70
India	1.18	1.17	1.10	0.29	0.31	0.32	0.32	0.34	0.36	0.35	0.35
USSR	0.97	0.85	0.85	0.24	0.19	0.21	0.21	0.23	0.16	0.18	0.18
Others	0.36	0.34	0.35	0.67	0.78	0.89	0.89	0.24	0.26	0.31	0.31
<u>MAJOR OILSEEDS</u>	147.08	145.58	149.61	1.40	1.44	1.43	1.43	205.85	209.41	214.14	214.29
United States	29.44	29.23	31.18	2.01	2.07	2.01	2.04	59.29	60.65	62.76	63.73
Total Foreign	117.64	116.35	118.43	1.25	1.28	1.27	1.27	146.56	148.77	151.38	150.56
<u>COPRA</u>	--	--	--	--	--	--	--	4.90	4.69	4.69	4.57
<u>PALM KERNEL</u>	--	--	--	--	--	--	--	3.33	3.28	3.59	3.59
<u>TOTAL OILSEEDS</u>	--	--	--	--	--	--	--	214.08	217.38	222.41	222.45
<u>PALM OIL 2/</u>	--	--	--	--	--	--	--	10.91	11.08	11.91	11.91

1/ U.S. rapeseed estimates by the WAOB and Interagency Oilseeds Committee. 2/ Not included in total oilseeds.



TABLE 7

## Cotton Area, Yield, and Production World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1989/90	Proj. 1990/91	Proj. 1991/92	Prel. 1989/90	1991/92 Proj. 1990/91 Oct.	Nov.		Prel. 1989/90	1991/92 Proj. 1990/91 Oct.	Nov.	
	---Million Hectares---			---Kilograms Per Hectare---				---Million 480-Pound Bales---			
World	31.6	33.1	34.2	552	573	578	583	80.0	87.0	90.7	91.6
United States	3.9	4.7	5.5	688	711	706	727	12.2	15.5	17.6	18.2
Total Foreign	27.7	28.3	28.8	533	550	554	556	67.8	71.5	73.1	73.4
Maj. Foreign Exporters	13.1	13.2	13.5	727	790	775	776	43.7	48.0	48.3	48.3
Australia	0.2	0.3	0.3	1,271	1,563	1,379	1,532	1.4	1.9	1.9	1.9
Central America 1/	0.1	0.1	0.1	832	810	742	742	0.3	0.3	0.3	0.3
China	5.2	5.6	6.0	728	807	798	798	17.4	20.7	22.0	22.0
Egypt	0.4	0.4	0.4	683	719	811	811	1.3	1.4	1.3	1.3
Mexico	0.2	0.2	0.3	891	914	754	737	0.8	0.8	0.9	0.9
Pakistan	2.6	2.7	2.8	560	607	612	612	6.7	7.5	7.8	7.8
Sudan	0.3	0.2	0.2	456	422	498	494	0.6	0.4	0.4	0.4
Turkey	0.7	0.6	0.6	851	1,021	956	956	2.8	3.0	2.7	2.7
USSR	3.3	3.2	3.0	805	827	796	796	12.3	12.0	11.0	11.0
Major Importers 2/	0.4	0.4	0.3	887	801	833	861	1.5	1.5	1.3	1.4
Other Foreign	14.3	14.7	14.9	346	326	345	348	22.6	22.0	23.5	23.7
Argentina	0.6	0.6	0.6	486	467	465	501	1.3	1.4	1.3	1.5
Brazil	1.9	2.0	2.0	347	340	381	381	3.0	3.1	3.5	3.5
India	7.3	7.4	7.3	315	270	298	298	10.6	9.1	10.0	10.0
Syria	0.2	0.2	0.2	930	963	934	934	0.7	0.7	0.7	0.7
Others	4.3	4.6	4.8	357	369	368	370	7.0	7.7	8.0	8.1

1/ Nicaragua, Guatemala, El Salvador, Honduras, and Costa Rica.

2/ Western Europe, Eastern Europe, Japan, Hong Kong, Republic of Korea, and Taiwan.

November 1991

Production Estimates and Crop Assessment Division, FAS, USDA



TABLE 8

The table below presents a 10-year record of the difference between the November projections and the final estimates. Using world wheat production as an example, changes between the November projection and the final estimate have averaged 6.7 million tons (1.3 percent) and ranged from -18.1 to 7.2 million tons. The November projection has been below the final 7 times and above the final 3 times.

## RELIABILITY OF PRODUCTION PROJECTIONS

COMMODITY AND REGION	PROJECTION AND FINAL ESTIMATES, 1981/82 – 1990/91 1/					
	Difference		Lowest	Highest	Below Final	Above Final
	Average	Average	Difference			
	Percent	---Million Metric Tons---			Number of Years 2/	
<i>WHEAT</i>						
World	1.3	6.7	-18.1	7.2	7	3
U.S.	0.5	0.3	-1.2	0.2	6	4
Foreign	1.6	6.8	-18.2	7.4	7	3
<i>COARSE GRAINS 3/</i>						
World	1.0	8.1	-19.1	7.8	7	3
U.S.	1.3	2.7	-7.5	2.1	8	2
Foreign	1.1	6.4	-14.3	6.0	6	4
<i>RICE (Milled)</i>						
World	2.5	7.9	-16.8	1.6	9	1
U.S.	2.7	0.1	-0.2	0.2	6	3
Foreign	2.6	7.9	-16.9	1.7	9	1
<i>SOYBEANS</i>						
World	2.4	2.2	-4.4	3.6	4	6
U.S.	2.6	1.3	-2.7	2.1	3	7
Foreign	3.9	1.7	-2.3	3.4	5	5
		---Million 480-lb. Bales---				
<i>COTTON</i>						
World	2.4	1.9	-6.5	2.8	7	3
U.S.	2.7	0.3	-0.8	0.5	6	3
Foreign	2.7	1.8	-6.8	2.3	5	5
<i>UNITED STATES</i>		-----Million Bushels-----				
<i>CORN</i>	2.0	134	-368	89	7	3
<i>SORGHUM</i>	3.3	25	-59	39	6	4
<i>BARLEY</i>	1.7	8	-12	24	5	4
<i>OATS</i>	1.3	6	-18	16	6	3

1/ The final estimate for 1981/82-1989/90 is defined as the first November estimate following the marketing year and for 1990/91 last month's estimate.

2/ May not total ten if projection was the same as the final.

3/ Includes corn, sorghum, barley, oats, rye, millet, and mixed grain.



# WORLD AGRICULTURAL WEATHER HIGHLIGHTS

NOVEMBER 12, 1991

## 5 - SOUTH AFRICA

Early season rains improve planting prospects in primary corn areas.

## 6 - SOUTH ASIA

Conditions generally favor maturing summer crops. Rain in eastern and southern rice areas boosts reservoirs for dry season crops, but a recent cyclone floods the south coast. Winter wheat planting progresses.

## 7 - EASTERN ASIA

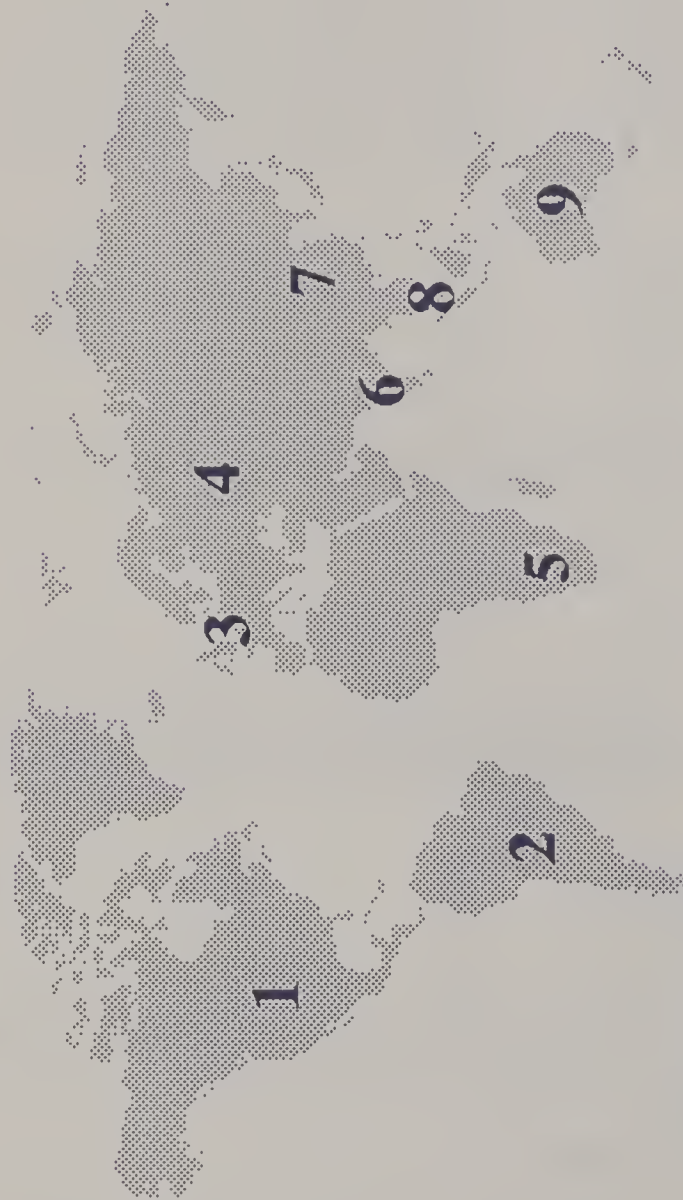
Dry weather helps summer crop harvesting across the country, but moisture is needed for North China Plain winter wheat germination. Portions of southern China still need rain to replenish reservoirs. Several typhoons hit Japan causing widespread flooding.

## 8 - SOUTHEAST ASIA

Lingering monsoon rains in Indochina increase reservoirs for dry season rice but cause more local flooding. Drought persists in Java's rice areas. Two storms hit the Philippines, causing local flooding and crop damage but providing much needed moisture to many crop areas.

## 9 - AUSTRALIA

Drought in southern Queensland and northern New South Wales hurts winter wheat. Western areas also receive below normal rainfall. Recent rains increase planting moisture for eastern summer crops, but more is needed.



## 3 - EUROPE

Widespread rain slows sugarbeet and late corn harvesting in the west and southeast. The moisture boosts winter grain establishment throughout the region but topsoil moisture is limited in the northeast, where recent cold weather induces winter grain hardening.

## 4 - WESTERN USSR

Late October rain improves moisture for winter wheat in the southeast, but unseasonably cool weather limits plant establishment. Corn harvest progresses slowly.

## 1 - UNITED STATES

Earlier dry, warm weather aids harvest in the corn belt and maturation in all cotton areas. Dryness hampers HRW wheat establishment, followed by a protective snow cover and record cold in early November.

## 2 - SOUTH AMERICA

In Argentina, widespread rain favors germination and early development of corn, soybeans, and cotton. Moisture is favorable for grain-filling winter wheat, and for summer crops across southern Brazil. However, in São Paulo and eastern Minas Gerais, rain is needed for coffee and citrus flowering.

*(More details are available in the Weekly Weather and Crop Bulletin. Subscription information may be obtained by calling (202) 720-7917.)*



## WEATHER BRIEFS

### SOUTH AFRICA: SPRING RAINFALL ABOVE NORMAL

Above normal early spring rainfall (October 1-November 11, 1991) in the Maize Triangle of South Africa benefited the wheat crop and provided adequate soil moisture for early corn planting. During October 1991, rainfall was 200 - 800 percent of normal across major corn growing areas, the Transvaal and Orange Free State. Drier weather during November 2-8, 1991, favored early field work. Corn planting should generally be in full progress by mid-November. Rainfall during October and early November 1991, was also above normal and beneficial across sugarcane regions of Natal. Periods of heavy rainfall across the southern and eastern Cape Province during October 20-November 7, 1991 caused some damage to mature wheat, but reduced the impact of a multi-year drought.

### CHINA: DRYNESS AFFECTS WINTER WHEAT CROP

Much of the North China Plain is dry affecting establishment of the 1992 winter grain crop. Light rain (about 10 mm) fell across this region on November 6-7, 1991, the only measurable precipitation since mid-September. Dryness has hurt winter wheat across southern Shandong, Henan, Anhui, and Jaingsu. Planting has been delayed and newly emerged wheat has been stressed. Early season stress to winter wheat can cause poor establishment, reduce tiller counts, and hinder adequate winter hardening. Temperatures have been generally mild until November 1, 1991, when freezing temperatures dipped as far south as Shandong and Henan.

### AUSTRALIA: SOME RAIN, BUT DROUGHT CONTINUES

Rainfall amounts continued across eastern Australia at below normal levels during October 11-November 11, 1991. Periods of light-to-moderate rain brought some relief to portions of New South Wales, Victoria, and southern Queensland during October 20-November 8, 1991. This rain was of little benefit to winter grains, but improved topsoil moisture levels, benefiting summer crop planting. The drought in Queensland has already caused delays in cotton and sorghum planting and stressed pastures and northeast coast sugarcane. Temperatures in eastern Australia during late October and early November have been mostly 1-3 degrees above normal, somewhat increasing crop stress.



## PRODUCTION BRIEFS

### ARGENTINA: PRESIDENTIAL DECREE DEREGULATES AGRICULTURE

Argentine presidential decree 2248/91, published November 1, 1991, will deregulate much of the farm economy, according to the U.S. agricultural attache in Buenos Aires. If fully implemented, the decree would dissolve the National Grain Board (JNG), the National Meat Board (JNC), and the National Sugar Board and affect laws covering production and marketing of tobacco, sugar, meat, and dairy products. In addition, the statistical tax on exports and imports would be eliminated as well as the fee schedule for grain transportation by truck. Taxes and transportation are a major share of the high marketing costs associated with Argentine agriculture. The government expects that grain transportation costs will be reduced by 30 percent as a result of these reforms. The abolition of the commodity boards makes official, in some respects what was already reality because they had not been operating as originally intended. Some functions of the JNG and the JNC, such as maintaining quality standards and collecting and publishing statistics on production and export registrations, will likely be transferred to the Agricultural Secretariat.

### BRAZIL: 1991/92 SOYBEAN PLANTING OUTLOOK

With planting of the 1991/92 soybean crop nearly 10 percent complete (as of November 1), there is still considerable uncertainty about the eventual acreage that will be seeded. Although there is a general consensus that a continuing domestic corn shortage and favorable prices will allow corn to partially displace soybeans in the southern growing region, area expansion in the center-west states may offset the decline in the south. Recent changes in Brazilian agricultural policy may also favor increased soybean plantings. During the past several weeks the government improved production credit terms available to growers and abolished the minimum price differentials between the center-west states and the southern states. The improved credit situation should encourage more soybean plantings. The deregionalization of minimum prices for soybeans, as well as corn, sorghum, and rice, is intended to encourage planting in the center-west states, a reversal of last year's policy which led to serious cropping area reductions in that region. In addition, the planting season for cotton and corn is nearing an end in the Center-South and with prolonged dry weather restricting plantings of both, the possibility for area diversions to soybeans increases. The recent devaluation of the local currency is also seen as an incentive for soybean production.



## BRAZIL: 1991/92 COTTON PLANTING OUTLOOK

The Government of Brazil has announced several new measures aimed at encouraging increased plantings and input utilization for the November-April 1991/92 cotton crop in the Center-South. Cotton is also grown in June-October in northeastern Brazil. On October 10, 1991, the government installed a new credit policy which reduced interest rates and made production credit more attractive. On November 1, 1991, the government raised minimum prices and VBC's (basic production costs) to keep them in line with inflation. In spite of these attempts to stimulate plantings, producers argue that the new measures were announced too late to impact cotton planting intentions and that the revised interest rates are still too high. In addition to these economic factors, agronomic considerations threaten to reduce cotton plantings. Prolonged dry weather in several key producing states has caused some delays in tilling and planting of the 1991/92 crop. The delays may cause shifting of cotton area to corn or soybeans which have planting seasons through December. However, the Parana State Secretariat of Agriculture has extended the official planting season for purposes of crop insurance from October 20 to November 10, giving farmers additional time to plant without losing the right to government crop insurance.

## CANADA: WINTER WHEAT PLANTINGS AT RECORD LEVEL IN ONTARIO

The 1992/93 winter wheat planted area in Ontario is reported to be a record 0.38 million hectares, nearly double the 1991/92 area, according to the U.S. agricultural counselor in Canada. The potential record plantings are attributed to attractive income guarantees under the Gross Revenue Insurance Program, early soybean harvest, and ample soil moisture at planting time. Ontario produces about 70 percent of Canada's winter wheat. Winter wheat accounts for about 5 percent of Canada's total wheat output.

## CANADA: FARMERS RECEIVE AID PACKAGE

On October 11, 1991 the Canadian Agricultural Minister announced a U.S.\$709 million equivalent farm-aid package as part of a comprehensive strategy to deal with the the income problems of Canadian farmers. While grain farmers will be the major recipients, the package includes U.S.\$89 million in assistance for producers of other commodities. Details of the aid package are being finalized in line with recommendations by the Third Line of Defense Committee. (The Committee is an advisory group of farm leaders and government officials created last year to address issues facing the farm sector.) The aid is in addition to the U.S.\$2.2 billion which will be disbursed to grain and oilseed producers participating in the Gross Revenue Insurance Plan (GRIP) and Net Income Stabilization Account (NISA).



#### CHINA: FEED AND POULTRY SITUATION IN SOUTHERN PROVINCES

The feed and poultry industries in southern China have undergone explosive growth over the past few years. Guangdong province, adjacent to Hong Kong, is the largest compound feed producer in the country. Production doubled to just over 2 million tons between 1985 and 1990 and is expected to double again to 4.5 million tons by 1995. Despite these huge increases, Guangdong is currently a feed deficit province and must import 4 to 5 million tons a year, almost all from other parts of the country. Guangdong had a poultry population of 632 million in 1990, and numbers have been increasing by 11 percent each year. About 65 percent of total compound feed supply is used to raise poultry (chickens, geese, and ducks) for meat, and another 8 percent for layers. While these percentages will remain relatively stable over the next 5 years, feed use in aquaculture is expected to increase from the current 2 percent to 15 percent of total feed production. The potential for growth in the egg market is underscored by the following facts: egg supplies to Guangzhou City are about 300 eggs per person per year, but egg supplies to Guangdong Province overall, which has a population of 65 million, are just 25 eggs per person per year.

#### CHINA: LARGE GRAIN HARVEST EXPECTED IN THE NORTHEAST

Provincial officials expect a large grain crop this year in China's northeastern provinces of Liaoning, Jilin, and Heilongjiang. Production in Liaoning is forecast to equal or exceed the target of 14.5 million tons (including soybeans, pulses, and potatoes) because of liberal use of inputs and favorable weather. Jilin expects to harvest 17.5 million tons of grain, the second largest crop in history, despite reports that nearly one half of its total sown area was affected by drought and/or floods. Heavy flooding in Heilongjiang reportedly affected 2.62 million hectares of grain and other crops, 30 percent of the total sown area, and about 867,000 hectares of crops were completely destroyed. However, Heilongjiang still had an abundant grain harvest because of an increase in total sown area, greater use of higher-yielding varieties of corn and rice, heavier use of fertilizer and other inputs, and favorable autumn weather. Total grain production in Heilongjiang will be at least 20 million tons, second only to last year's record crop.

#### INDONESIA: DROUGHT HAMPERS RICE PLANTING

Sporadic rain fell in Indonesia in early November, but did not end the persistent drought covering Java, southern Sumatra, and Kalimantan. As a result, the main season rice planting for 1992 harvest is being delayed. These three regions produce over 85 percent of Indonesia's total rice, with Java alone producing 60 percent. The main season crop accounts for two-thirds of Indonesia's total rice production. Reports indicate an increasing number of communities suffering water shortages. Reservoirs are low and rain is needed to replenish supplies so that farmers can start planting. Although the main season planting can be extended into January, rice is usually planted by the end of November and harvested in May.



THE PHILIPPINES: PINEAPPLE CROP ESTIMATE REVISED UPWARD

The U.S. agricultural counselor in Manila reports that the estimate of the 1991 pineapple crop has been revised upward to 1,160,000 tons, 10,000 more than the preliminary forecast in April, but still only moderately above the 1990 crop. The increase reflects a larger than anticipated "plant" crop from newly opened production areas in Davao. Latest crop estimates are:

	<u>1989</u>	<u>1990</u>	<u>1991 (April)</u>	<u>1991 (November)</u>
Area Planted (Ha.)	60,973	61,000	62,000	62,000
Area Harvested (Ha.)	32,925	31,720	32,860	32,860
Production (MT)	1,178,750	1,156,000	1,150,000	1,160,000

THAILAND: PINEAPPLE ESTIMATE RAISED

The preliminary forecast for 1991 fresh pineapple production in Thailand has been revised upward to 1,632,000 tons, according to the U.S. agricultural attache in Bangkok. This is 9 percent greater than the April 1991 estimate and an 8 percent increase over the 1990 harvest. Unseasonably dry conditions from early 1990 through May 1991 lowered yields and compromised sizing of the early season crop. However, a turnaround in the rainfall pattern since June 1991, coupled with heightened grower attention to cultivation practices, is expected to boost yields for the secondary, winter crop enough for production to reach a more normal level slightly above the previous 5-year average of 1,616,000 tons. Latest crop estimates are:

	<u>1989</u>	<u>1990</u>	<u>1991 (April)</u>	<u>1991 (November)</u>
Area Planted (Ha.)	95,000	100,000	105,000	105,000
Area Harvested (Ha.)	71,250	75,000	78,000	78,000
Production (MT)	1,732,000	1,512,000	1,500,000	1,632,000



## FEATURE COMMODITY ARTICLES

### WORLD SUGAR PRODUCTION

World 1991/92 centrifugal sugar production is estimated at 112.6 million tons (raw value), down 0.6 million from the September forecast and 400,000 less than last year. World sugar production from cane is forecast at 73.5 million tons, up 1 percent from the September forecast and 3 percent more than in 1990/91. Harvested area of cane is estimated at 11.7 million hectares, unchanged from September but 3 percent more than the 1990/91 harvested area. World sugar outturn from sugarbeets at 39.1 million tons for 1991/92 is down 2 percent from September's forecast and 5 percent less than last year. Harvested area of sugarbeets is estimated at 8.5 million hectares, down 2 percent from the area harvested in 1990/91.

European Community (EC) sugar production, accounting for 14 percent of the world's total, is down 5 percent from the September forecast and down 9 percent from the 1990/91 crop. The November decline was attributed to a 7 percent decrease in sugarbeet yields, though partially offsetting the decline was an increase of 7,000 hectares in area harvested. The recovery rate of the 1991/92 crop of 15.6 percent compares with 16.2 in the previous season brought on by a higher sugar content in the beets. In France, the largest producer in the EC, sugar output is down 4 percent from September and 9 percent (450,000 tons) from the 1990/91 crop. The decrease, from a year ago, is attributed to a 21,000 hectare decline in area harvested and a reduction of 1.4 percent in sugar content to 17.2. In Germany, the second largest producer in the EC, sugar outturn is forecast at 4.15 million tons, down 9 percent from September. Last season, combined East and West German sugar production was 4.67 million. Some other EC-12 countries showing decreases from last season are Spain, Belgium-Luxembourg, Denmark, and the Netherlands down 5, 21, 15, and 22 percent, respectively. The Denmark forecast was unchanged from September, but Spain, Belgium-Luxembourg, and the Netherlands were down 10, 7, and 5 percent, respectively. In Italy, the new estimate is down 3 percent from September but up 4 percent from last year mainly because of a 10,000 hectare increase in area harvested. Sugar outturn for 1991/92 in the United Kingdom is expected to be the same as a year ago.

In India, the world's largest sugar producer, outturn for the 1991/92 season is estimated at a record 13.6 million tons, up 1 percent from September and 3 percent from last year's record level. The Indian sugar industry continues to expand, despite the tenuous financial condition of most of the public sector sugar companies and many of those in the cooperative and private sectors. The sugarcane area harvested for centrifugal sugar increased 70,000 hectares in the 1991/92 season and is 210,000 hectares more than 2 years ago. The sugarcane yield is expected to be down from last season, but the recovery rate of 10.8 percent will be a record-high level. Khandsari and gur compete with sugar mills for sugarcane. Gur is a crystallized brown type sugar produced by small, on-farm units and consumed locally. Khandsari, accounting for less than 5 percent of the total centrifugal sugar production, is a native semi-white sugar. Khandsari production, forecast at 400,000 tons in 1991/92, is included in India's total centrifugal production.



The system of paying farmers for their sugarcane in India varies considerably from region to region. In north India, the major producing states of Punjab, Haryana, and Bihar generally follow the lead of Uttar Pradesh in setting a politically determined "state advised" sugarcane price which is far above the national government's minimum price. For the 1990/91 season it was rs. 23 (U.S.\$1.27) per 100 kg. In Maharashtra, the largest sugar producing state, virtually all sugar is produced by cooperatives which make initial payments slightly exceeding the government's minimum price, with subsequent payments depending on returns for the entire season. Variations on this payment pattern are followed throughout the South. The financial condition of mills in the southern region is better than the North, which must come up with the full sugarcane price within 3 weeks of delivery, many months before the resulting sugar is released by the government to ration shops or the open market.

Based on Soviet information, the 1991/92 USSR sugar production is estimated at 8.7 million tons, making the Soviet Union the world's second largest producer. This estimate is down 3 percent from September and down 5 percent (460,000 tons) from a year earlier. The decline from 1990/91 is attributed to a 4 percent reduction in both sugarbeet area and in sugarbeet yields. The estimate of 75 million tons of raw sugarbeet material is 8 percent less than last year and the lowest since the 1982/83 harvest. Weather in 1991 had not been altogether favorable throughout most of the year. The major sugarbeet areas had the problem of too much rainfall during the growing season rather than suffering from a lack of moisture. The lack of delivery of herbicides led to weed infestations in many regions restricting the development of the sugarbeet plant. Further, adverse weather had a negative impact on sugarbeet harvesting.

In Brazil, the 1991/92 sugar crop is up slightly from the September forecast, and up 8 percent from the 1990/91 crop. The forecast approximates the outturn of sugar authorized by the Government of Brazil. A 4 percent increase in the area of sugarcane harvested is forecast for the 1991/92 season.

Sugar production in Asia is estimated up marginally from the September forecast and shows an increase of 4 percent over last year. All six of the major producing countries in this region expect increases over last season except Indonesia, which is down 3 percent. In China, sugar output is unchanged from the forecast in September but 5 percent more than last year's crop. Production at this level is a record and surpasses the 1990/91 record harvest of 6.6 million tons. Sugar production from sugarbeets is expected to increase 8 percent over the 1990/91 crop and the outturn from cane is forecast up 5 percent. Sugarbeet area of 750,000 hectares for 1991/92 is up 12 percent, while sugarcane area is expected to increase by 4 percent. In Thailand, the 1991/92 forecast is up 10 percent from the September number and 11 percent above the previous season. The 1991/92 sugarcane area is expected to increase by 4 percent over that of last season. The expansion of planted area is occurring mainly in the Northeast, lower North, and Eastern regions. Sugarcane has been substituted in place of cassava, corn, and soybeans in the lower North and Eastern regions, while some cassava areas in the East have also been converted to sugarcane. Good monsoon rains since early August provided adequate moisture to stimulate the growth of sugarcane, despite 2 months of dryness during June and July. The ratoon crops in general seem to be good as they received adequate moisture in mid-April and May. The above average yield from the ratoon crop could compensate for some expected reduced yields in the newly planted sugarcane crop, which was affected by a shortage of water during the vegetative growth period. The sugarcane crush is expected to reach a record level 44 million tons. Improvements in crushing technology and more

Careful handling of the cane should improve the realized sucrose yield of the upcoming crop to about 100 kgs/ton, compared with 97.47 last season. Heightened grower interest in sugarcane production is attributable to the low interest advance payment provided by the sugar millers. The relocation of some crushing plants into non-traditional sugarcane regions has also spurred production.

In the Philippines, the sugar production estimate is unchanged from the September forecast but up 11 percent from last season based on expectations of larger harvested area, higher sugarcane yields, and higher sugar recovery rates relative to 1990/91. However, some downward adjustment in planted area and raw material production was made to reflect losses in southwestern Luzon attributable to the ongoing eruptions and mud flows from Mount Pinatubo since June 9, 1991. This is expected to be offset by higher sugarcane yields and sugar recovery in 1991/92 for the major Negros-Panay production area of the western Visayas islands.

In South Africa, the sugar production estimate is up 3 percent from the September forecast and up 2 percent from last season though harvested area is expected to be down 2 percent. Offsetting the lower area is an expected increase in the crush by 4 percent over the 1991/92 crop. South Africa has regained its U.S. sugar quota. This has caused an upbeat mood to the sugar industry.

The sugar production estimate for Australia is down 2 percent from September and 10 percent from a year ago because of a prolonged dry spell in the sugar growing areas of Queensland. Partially offsetting the decline is a 3 percent increase in sugarcane area.

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TABLE 9

WORLD CENTRIFUGAL SUGAR PRODUCTION  
1988/89 - 1991/92 1/

COUNTRY/REGION	1988/89	1989/90	1990/91 2/	Forecast 1991/92	
				Sept	Nov
(1,000 Metric Tons)					
NORTH AMERICA					
Canada	104	121	138	130	145
Mexico	3,678	3,100	3,600	3,450	3,450
United States 3/	6,089	6,008	6,287	6,690	6,690
SUBTOTAL	9,871	9,229	10,025	10,270	10,285
SOUTH AMERICA					
Argentina	1,284	944	1,240	1,350	1,350
Bolivia	162	180	225	230	230
Brazil	8,582	7,793	7,900	8,500	8,520
Chile	446	448	370	350	380
Colombia	1,435	1,611	1,602	1,665	1,650
Ecuador	315	331	352	360	360
Guyana	165	130	147	160	175
Paraguay	105	120	100	110	110
Peru	626	620	560	520	600
Suriname	1	1	1	1	1
Uruguay	85	75	70	70	85
Venezuela	513	495	515	480	520
SUBTOTAL	13,719	12,748	13,082	13,796	13,981
CENTRAL AMERICA					
Belize	92	102	102	100	100
Costa Rica	224	245	265	260	270
El Salvador	176	211	270	260	250
Guatemala	705	875	1,015	900	1,050
Honduras	184	199	186	210	200
Nicaragua	158	198	240	280	270
Panama	109	119	120	120	120
SUBTOTAL	1,648	1,949	2,198	2,130	2,260
CARIBBEAN					
Barbados	66	69	66	70	70
Cuba	8,100	8,000	7,623	7,500	7,300
Dominican Republic	735	632	656	660	670
Guadeloupe	90	42	70	75	75
Haiti	40	35	30	30	30
Jamaica	192	219	233	240	240
Martinique	2	2	4	5	5
Puerto Rico	83	62	67	68	68
St. Kitts - Nevis	32	25	15	20	20
Trinidad and Tobago	97	121	110	105	110
SUBTOTAL	9,437	9,207	8,874	8,773	8,588
EEC					
Belgium-Luxembourg	1,005	1,039	1,119	950	885
Denmark	550	529	591	500	500
France 4/	4,372	4,204	4,744	4,480	4,300
Germany	3,578	4,087	4,672	4,550	4,150
Greece	235	421	315	340	340
Ireland	212	233	245	230	230
Italy	1,609	1,880	1,587	1,700	1,650
Netherlands	1,074	1,241	1,339	1,100	1,050
Portugal	2	2	2	4	2
Spain	1,289	1,037	1,036	1,090	985
United Kingdom	1,417	1,322	1,360	1,350	1,360
SUBTOTAL	15,343	15,995	17,010	16,294	15,452
OTHER WEST EUROPE					
Austria	358	457	451	490	490
Finland	154	168	176	130	155
Sweden	375	401	419	215	230
Switzerland	150	152	160	150	150
SUBTOTAL	1,037	1,178	1,206	985	1,025

FOOTNOTES AT END OF TABLE

CONTINUED

TABLE 9 (Continued)

WORLD CENTRIFUGAL SUGAR PRODUCTION  
1988/89 - 1991/92 1/

COUNTRY/REGION	1988/89	1989/90	1990/91 2/	Forecast 1991/92 Sept	Nov
(1,000 Metric Tons)					
EAST EUROPE					
Albania	24	16	14	20	15
Bulgaria	80	60	80	50	70
Czechoslovakia	707	878	700	700	850
Hungary	513	630	550	650	650
Poland	1,825	1,865	2,174	1,750	1,700
Romania	425	499	334	310	400
Yugoslavia	660	930	885	820	820
SUBTOTAL	4,234	4,878	4,737	4,300	4,505
USSR 5/	8,900	9,530	9,160	9,000	8,700
NORTH AFRICA					
Algeria	10	10	10	10	10
Egypt	945	957	985	975	975
Morocco	527	494	519	550	550
Sudan	360	420	480	450	500
Tunisia	30	35	30	30	30
SUBTOTAL	1,872	1,916	2,024	2,015	2,065
OTHER AFRICA					
Angola	35	35	35	35	35
Benin	4	4	5	5	5
Burkina	20	20	20	20	20
Burundi	4	8	10	10	10
Cameroon	35	40	40	40	40
Chad	20	20	20	20	20
Congo (Brazzaville)	35	35	35	35	35
Cote d' Ivoire	146	164	180	180	180
Ethiopia	169	183	190	200	200
Gabon	20	20	20	20	20
Ghana	10	10	5	5	5
Guinea	25	25	25	25	25
Kenya	411	441	430	430	480
Madagascar	120	125	125	125	125
Malawi	185	175	200	180	200
Mali	20	20	20	20	20
Mauritius	672	602	661	650	625
Mozambique	25	30	35	40	40
Nigeria	53	53	59	60	60
Reunion	262	178	190	220	220
Rwanda	5	5	5	5	5
Senegal	60	60	60	60	60
Sierra Leone	5	6	6	8	8
Somalia	45	35	40	40	40
South Africa	2,340	2,289	2,282	2,265	2,330
Swaziland	462	504	527	510	500
Tanzania	101	95	112	110	115
Togo	4	4	5	5	5
Uganda	10	30	30	30	30
Zaire	60	60	60	60	60
Zambia	150	142	133	140	140
Zimbabwe	459	502	350	440	370
SUBTOTAL	5,972	5,920	5,915	5,993	6,028
MIDDLE EAST					
Iran	630	600	700	700	700
Iraq	10	10	10	10	5
Lebanon	6	6	6	6	6
Syria	30	41	43	50	50
Turkey	1,410	1,380	1,944	2,000	2,000
SUBTOTAL	2,086	2,037	2,703	2,766	2,761

FOOTNOTES AT END OF TABLE

CONTINUED

NOVEMBER 1991

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA



TABLE 9 (Continued)

WORLD CENTRIFUGAL SUGAR PRODUCTION  
1988/89 - 1991/92 1/

COUNTRY/REGION	1988/89	1989/90	1990/91 2/	Forecast 1991/92 Sept	Nov
(1,000 Metric Tons)					
OTHER ASIA					
Afghanistan	10	10	10	10	10
Bangladesh	117	196	262	220	220
Burma (Myanmar)	40	35	25	50	30
China	5,312	5,618	6,648	7,000	7,000
India 6/	10,150	12,088	13,241	13,500	13,600
Indonesia	1,920	2,080	2,120	2,100	2,050
Japan	984	988	925	960	915
Malaysia	100	105	95	110	100
Nepal	30	35	40	17	45
Pakistan	1,980	1,987	2,067	2,300	2,080
Philippines	1,600	1,750	1,718	1,900	1,900
Sri Lanka	35	35	35	35	35
Taiwan	664	511	438	550	460
Thailand	4,055	3,502	3,954	4,000	4,400
Vietnam	400	450	500	500	500
SUBTOTAL	27,397	29,390	32,078	33,252	33,345
OCEANIA					
Australia	3,680	3,797	3,515	3,200	3,150
Fiji	363	461	420	430	430
Papua New Guinea	50	35	45	30	50
SUBTOTAL	4,093	4,293	3,980	3,660	3,630
WORLD TOTAL	105,609	108,270	112,992	113,234	112,625

1/ One-half of the crop years are on a September/August basis. Crop years for Southern Hemisphere countries begin prior to September. Factors for converting from refined to raw sugar are 1.087 for refined beet sugar and 1.07 for refined cane sugar.

2/ Preliminary.

3/ United States data include continental beet and cane and Hawaii cane sugar, but exclude Puerto Rico cane sugar which is listed separately.

4/ French data exclude production of cane sugar in Guadeloupe, Martinique, and Reunion which are listed separately.

5/ Includes all of former republics including Lithuania.

6/ Indian data include production of Khandsari sugar, a native type, semi-white centrifugal sugar. Estimated output of Khandsari sugar in thousand tons is as follows: 1989/90 - 336; 1990/91 - 398; 1991/92 - 400.

NOVEMBER 1991

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 10

SUGARCANE AREA HARVESTED, YIELD AND PRODUCTION  
BY  
SELECTED SUGARCANE PRODUCING COUNTRIES 1/

COUNTRY/YEAR	AREA HARVEST	SUGAR CANE YIELD	SUGAR CANE PRODUCTION	RAW SUGAR	RECOVERY RATE	SUGAR YIELD
	1,000 HA	MT/HA	-----1,000 MT-----		PERCENT	MT/HA
Argentina 2/						
1989/90	240	44.2	10,606	944	8.9	3.93
1990/91	265	47.2	12,500	1,240	9.9	4.68
1991/92 NOV	280	46.4	13,000	1,350	10.4	4.82
Australia						
1989/90	331	83.3	27,562	3,797	13.8	11.47
1990/91	340	73.9	25,140	3,515	14.0	10.34
1991/92 NOV	350	77.0	26,950	3,150	11.7	9.00
Brazil						
1989/90	1,210	60.3	73,000	7,793	10.7	6.44
1990/91	1,170	64.1	75,000	7,900	10.5	6.75
1991/92 NOV	1,220	61.5	75,000	8,520	11.4	6.98
China 2/						
1989/90	960	50.8	48,795	4,851	9.9	5.05
1990/91	1009	57.1	57,620	5,261	9.1	5.21
1991/92 NOV	1,050	57.1	60,000	5,500	9.2	5.24
Colombia						
1989/90	113	123.9	14,000	1,611	11.5	14.26
1990/91	117	122.9	14,375	1,602	11.1	13.69
1991/92 NOV	120	121.3	14,550	1,650	11.3	13.75
Cuba						
1989/90	1,350	51.9	70,000	8,000	11.4	5.93
1990/91	1,350	50.0	67,500	7,623	11.3	5.65
1991/92 NOV	1,400	46.4	65,000	7,300	11.2	5.21
Dominican Republic						
1989/90	206	33.8	6,960	632	9.1	3.07
1990/91	210	34.4	7,220	656	9.1	3.12
1991/92 NOV	212	34.9	7,400	670	9.1	3.16
Egypt 2/						
1989/90	91	95.6	8,700	887	10.2	9.75
1990/91	90	95.6	8,600	890	10.3	9.89
1991/92 NOV	88	95.5	8,400	875	10.4	9.94
Fiji						
1989/90	60	68.2	4,089	461	11.3	7.68
1990/91	60	67.0	4,020	420	10.4	7.00
1991/92 NOV	60	67.0	4,020	430	10.7	7.17
Guatemala						
1989/90	120	72.6	8,712	875	10.0	7.29
1990/91	120	81.6	9,797	1,015	10.4	8.46
1991/92 NOV	125	80.0	10,000	1,050	10.5	8.40

FOOTNOTES AT END OF TABLE

CONTINUED

NOVEMBER 1991

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA



TABLE 10 (Continued)

SUGARCANE AREA HARVESTED, YIELD AND PRODUCTION  
BY  
SELECTED SUGARCANE PRODUCING COUNTRIES 1/

COUNTRY/YEAR	AREA HARVEST	SUGAR CANE YIELD	SUGAR CANE PRODUCTION	RAW SUGAR	RECOVERY RATE	SUGAR YIELD
	1,000 HA	MT/HA	-----1,000 MT-----		PERCENT	MT/HA
India						
1989/90	1,750	66.7	116,700	12,088	10.4	6.91
1990/91	1,890	66.4	125,510	13,241	10.5	7.01
1991/92 NOV	1,960	64.0	125,500	13,600	10.8	6.94
Indonesia						
1989/90	340	79.0	26,850	2,080	7.7	6.12
1990/91	365	76.9	28,074	2,120	7.6	5.81
1991/92 NOV	380	75.8	28,800	2,050	7.1	5.39
Mauritius						
1989/90	80	75.0	6,000	602	10.0	7.53
1990/91	80	75.0	6,000	661	11.0	8.26
1991/92 NOV	80	75.0	6,000	625	10.4	7.81
Mexico						
1989/90	511	68.1	34,800	3,100	8.9	6.07
1990/91	530	67.9	36,000	3,600	10.0	6.79
1991/92 NOV	518	67.6	35,000	3,450	9.9	6.66
Pakistan 2/						
1989/90	496	41.3	20,500	1,957	9.5	3.95
1990/91	555	40.7	22,600	2,042	9.0	3.68
1991/92 NOV	560	42.1	23,600	2,050	8.7	3.66
Peru						
1989/90	45	135.6	6,100	620	10.2	13.78
1990/91	46	134.8	6,200	560	9.0	12.17
1991/92 NOV	46	130.4	6,000	600	10.0	13.04
Philippines						
1989/90	310	69.1	21,425	1,750	8.2	5.65
1990/91	305	61.0	18,600	1,718	9.2	5.63
1991/92 NOV	325	63.1	20,500	1,900	9.3	5.85
South Africa						
1989/90	272	68.5	18,636	2,289	12.3	8.42
1990/91	275	66.2	18,198	2,282	12.5	8.30
1991/92 NOV	270	70.2	18,950	2,330	12.3	8.63
Sudan						
1989/90	40	112.5	4,500	420	9.3	10.50
1990/91	50	100.0	5,000	480	9.6	9.60
1991/92 NOV	50	100.0	5,000	500	10.0	10.00
Swaziland						
1989/90	36	105.5	3,797	504	13.3	14.00
1990/91	37	104.1	3,850	527	13.7	14.24
1991/92 NOV	37	103.0	3,810	500	13.1	13.51

FOOTNOTES AT END OF TABLE

CONTINUED

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PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 10 (Continued)

SUGARCANE AREA HARVESTED, YIELD AND PRODUCTION  
BY  
SELECTED SUGARCANE PRODUCING COUNTRIES 1/

COUNTRY/YEAR	AREA HARVEST	SUGAR CANE YIELD	SUGAR CANE PRODUCTION	RAW SUGAR	RECOVERY RATE	SUGAR YIELD
	1,000 HA	MT/HA	-----1,000 MT-----		PERCENT	MT/HA
Taiwan						
1989/90	61	86.6	5,283	511	9.7	8.38
1990/91	56	75.4	4,220	438	10.4	7.82
1991/92 NOV	58	77.6	4,500	460	10.2	7.93
Thailand						
1989/90	688	48.8	33,560	3,502	10.4	5.09
1990/91	820	49.5	40,560	3,954	9.7	4.82
1991/92 NOV	850	51.8	44,000	4,400	10.0	5.18
U.S. (Hawaii) 4/						
1989/90	30	214.2	6,425	771	12.0	25.70
1990/91	29	204.5	5,931	675	11.4	23.28
1991/92 NOV	27	210.9	5,695	726	12.7	26.89
U.S. (Mainland) 2/						
1989/90	295	64.5	19,039	2,093	11.0	7.09
1990/91	265	68.3	18,087	2,119	11.7	8.00
1991/92 NOV	309	65.8	20,322	2,426	11.9	7.85
Venezuela						
1989/90	115	55.2	6,346	495	7.8	4.30
1990/91	102	64.7	6,600	515	7.8	5.05
1991/92 NOV	95	75.8	7,200	520	7.2	5.47
Zimbabwe						
1989/90	35	109.0	3,816	502	13.2	14.34
1990/91	35	71.4	2,500	350	14.0	10.00
1991/92 NOV	35	85.7	3,000	370	12.3	10.57
MAJOR CANE PRODUCERS						
1989/90	9,785	62.0	606,201	63,135	10.4	6.45
1990/91	10,171	61.9	629,702	65,404	10.4	6.43
1991/92 NOV	10,505	61.1	642,197	67,002	10.4	6.38
OTHERS						
1989/90	1,173	57.6	67,607	5,961	8.8	5.08
1990/91	1,206	58.3	70,363	6,288	8.9	5.21
1991/92 NOV	1,223	58.5	71,541	6,519	9.1	5.33
WORLD						
1989/90	10,958	61.5	673,808	69,096	10.3	6.31
1990/91	11,377	61.5	700,065	71,692	10.2	6.30
1991/92 NOV	11,728	60.9	713,738	73,521	10.3	6.27

1/ Refined cane sugar is converted to raw value by a factor of 1.07.

2/ Produces beet sugar as well as cane sugar. 3/ Includes Khandsari (native type semi-white centrifugal sugar. 4/ Hawaiian cane is harvested once every 24 months, consequently yields per hectare are much higher than in countries where cane is harvested every year.

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TABLE 11  
SUGARBEET AREA HARVESTED, YIELD AND PRODUCTION  
BY  
SELECTED SUGARBEET PRODUCING COUNTRIES 1/

COUNTRY/YEAR	AREA HARVEST	BEET YIELD	SUGAR BEET PRODUCTION	SUGAR RAW SUGAR	RECOVERY RATE	SUGAR YIELD
	1,000 HA	MT/HA	-----1,000 MT-----		PERCENT	MT/HA
Austria						
1989/90	47	56.2	2,641	457	17.3	9.72
1990/91	50	49.9	2,494	451	18.1	9.02
1991/92 NOV	51	52.9	2,700	490	18.1	9.61
Belgium Luxembourg						
1989/90	111	59.8	6,640	1,039	15.6	9.36
1990/91	112	61.2	6,857	1,119	16.3	9.99
1991/92 NOV	107	52.1	5,570	885	15.9	8.27
China 2/						
1989/90	569	16.2	9,243	767	8.3	1.35
1990/91	670	21.7	14,525	1,387	9.5	2.07
1991/92 NOV	750	20.0	15,000	1,500	10.0	2.00
Czechoslovakia						
1989/90	182	35.1	6,389	878	13.7	4.82
1990/91	170	31.6	5,374	700	13.0	4.12
1991/92 NOV	170	36.5	6,200	850	13.7	5.00
Denmark						
1989/90	67	49.4	3,309	529	16.0	7.90
1990/91	66	55.8	3,685	591	16.0	8.95
1991/92 NOV	67	47.8	3,200	500	15.6	7.46
France						
1989/90	427	56.0	23,915	4,204	17.6	9.85
1990/91	474	53.8	25,520	4,744	18.6	10.01
1991/92 NOV	453	55.3	25,065	4,300	17.2	9.49
Germany						
1989/90	609	44.2	26,901	4,087	15.2	6.71
1990/91	619	49.0	30,310	4,672	15.4	7.55
1991/92 NOV	572	45.5	26,000	4,150	16.0	7.26
Hungary						
1989/90	115	38.3	4,400	630	14.3	5.48
1990/91	115	38.3	4,400	550	12.5	4.78
1991/92 NOV	115	43.5	5,000	650	13.0	5.65
Italy						
1989/90	290	57.2	16,600	1,880	11.3	6.48
1990/91	270	43.0	11,600	1,587	13.7	5.88
1991/92 NOV	280	42.9	12,000	1,650	13.8	5.89
Japan 2/						
1989/90	72	50.9	3,664	667	18.2	9.26
1990/91	72	55.5	3,994	700	17.5	9.72
1991/92 NOV	72	52.1	3,750	660	17.6	9.17
Netherlands						
1989/90	128	56.3	7,208	1,241	17.2	9.70
1990/91	125	69.7	8,707	1,339	15.4	10.71
1991/92 NOV	125	60.0	7,500	1,050	14.0	8.40

FOOTNOTES AT END OF TABLE

CONTINUED

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Production Estimates and Crop Assessment Division FAS, USDA

TABLE 11 (Continued)  
SUGARBEET AREA HARVESTED, YIELD AND PRODUCTION  
BY  
SELECTED SUGARBEET PRODUCING COUNTRIES 1/

COUNTRY/YEAR	AREA HARVEST	BEET YIELD	SUGAR BEET PRODUCTION	SUGAR RAW SUGAR	RECOVERY RATE	SUGAR YIELD
	1,000 HA	MT/HA	-----1,000 MT-----		PERCENT	MT/HA
Poland						
1989/90	423	34.0	14,374	1,865	13.0	4.41
1990/91	440	38.0	16,721	2,174	13.0	4.94
1991/92 NOV	361	36.0	13,000	1,700	13.1	4.71
Romania						
1989/90	243	26.5	6,432	499	7.8	2.05
1990/91	155	20.1	3,114	334	10.7	2.15
1991/92 NOV	203	24.6	5,000	400	8.0	1.97
Spain 2/						
1989/90	160	44.8	7,172	1,023	14.3	6.39
1990/91	160	45.4	7,265	1,020	14.0	6.38
1991/92 NOV	150	46.0	6,900	970	14.1	6.47
Turkey						
1989/90	350	31.2	10,930	1,380	12.6	3.94
1990/91	378	37.0	13,986	1,944	13.9	5.14
1991/92 NOV	378	39.7	15,000	2,000	13.3	5.29
U.S.S.R.						
1989/90	3,344	29.1	97,414	9,530	9.8	2.85
1990/91	3,287	24.8	81,400	9,160	11.3	2.79
1991/92 NOV	3,154	23.8	75,000	8,700	11.6	2.76
United Kingdom						
1989/90	194	41.2	8,000	1,322	16.5	6.81
1990/91	192	41.7	8,000	1,360	17.0	7.08
1991/92 NOV	170	46.2	7,850	1,360	17.3	8.00
United States 2/						
1989/90	524	43.5	22,800	3,144	13.8	6.00
1990/91	557	44.9	24,982	3,493	14.0	6.27
1991/92 NOV	561	45.6	25,563	3,538	13.8	6.31
Yugoslavia						
1989/90	142	47.9	6,797	930	13.7	6.55
1990/91	158	37.4	5,915	885	15.0	5.60
1991/92 NOV	138	39.9	5,500	820	14.9	5.94
MAJOR BEET PRODUCERS						
1989/90	1,117	29.4	32,818	4,011	12.2	3.59
1990/91	1,257	32.2	40,417	5,000	12.4	3.98
1991/92 NOV	1,342	31.0	41,588	5,168	12.4	3.85
OTHERS						
1989/90	7,477	36.8	275,079	35,163	12.8	4.70
1990/91	7,413	35.3	261,812	36,300	13.9	4.90
1991/92 NOV	7,116	34.7	247,045	33,936	13.7	4.77
WORLD						
1989/90	8,594	35.8	307,897	39,174	12.7	4.56
1990/91	8,670	34.9	302,229	41,300	13.7	4.76
1991/92 NOV	8,458	34.1	288,633	39,104	13.5	4.62

1/ Refined beet sugar is converted to raw value by a forecast of 1.087.

2/ Produces cane sugar as well as beet sugar.

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## WORLD PEANUT PRODUCTION

World peanut production in 1991/92 is estimated at 23.5 million tons, up 0.6 million or 3 percent from last year. This will be a record crop and over 0.2 million tons above the old record set during 1988/89. India, China, and the United States will account for 16.4 million tons or 70 percent of world output. Peanut crops in both India and the United States are expected to be up from 1990/91, by 1 and 37 percent, respectively. China's peanut crop is expected to be down 4 percent from last year. This year's peanut crop was slightly above the harvest of 1990/91 since the majority of the countries recovered from last year's poor growing conditions that were caused by dry weather or lack of adequate irrigation. This includes most countries that rely on peanut and peanut product exports for a significant portion of their foreign exchange and reserves. The accompanying tables of peanut area, yield, and production for 1980/81 through 1991/92 provide the official USDA estimates for countries worldwide.

### INDIA

India ranks first in the world in both cultivated peanut area and production. The 1991/92 crop is forecast to improve slightly from last year's 8.1 million tons to an estimated 8.2 million. Harvested area in 1991/92 is forecast at a near record 8.7 million hectares. Peanuts are the key oilseed cultivated in India but experience wide fluctuation in annual production. Between 1980/81 and 1990/91, Indian peanut output increased 61 percent, while harvested area climbed 27 percent. The primary summer growing season was adversely affected by inadequate or untimely rains during 1991/92, causing poor yield prospects, particularly in Gujarat. Elsewhere, monsoon rainfall was typically beneficial and helped prevent additional large scale losses. Winter season peanuts are being sown at present and are typically irrigated. Slightly higher area and yield are forecast for this portion of the 1991/92 crop, owing to high market price incentives and favorable planting conditions.

### CHINA

China is the world's second largest producer of peanuts after India. Although it has only about a third of India's peanut area, China's yields of 1.8-2.2 metric tons per hectare are twice as high. Peanut area in 1991 is unchanged from a year ago at 2.9 million hectares, but production is estimated at 6.1 million tons, down 4 percent from last year's near-record crop. Most of China's peanut areas experienced no major weather problems during the 1991 growing season.

Peanuts are grown widely throughout China, but production is concentrated in Shandong province, which accounts for more than 35 percent of the total crop. Peanuts are also a major crop in Henan and Hebei provinces on the North China Plain and Guangdong and Guangxi province in southern China. After rising steadily in the early 1980's, China's peanut area and production peaked in 1985/86 at 3.3 million hectares and 6.7 million tons, respectively. Despite a continuing strong demand for peanut products, area fell after 1985 because of competition for scarce farmland from cotton, grain, and other cash crops. The Chinese Government has taken several steps to encourage peanut production in recent years. In 1990, the government raised the state procurement price by about 25 percent to make peanuts more profitable relative to grain. It also supported production through investments in agricultural inputs, technology, and management.

## INDONESIA

Indonesia is the world's fourth largest peanut producer, but accounts for only 3 percent of the world's total output. Harvested area during 1991/92 is estimated at 645,000 hectares and production is pegged at a record 920,000 tons, up 3 percent over last year. Peanuts are grown mainly on the islands of Java (70 percent) and Sumatra (14 percent). There is no active Indonesian Government program for peanuts as there is for other commodities such as rice and soybeans. The government's first priority in food production is aimed at maintaining rice self-sufficiency, with its second priority focused on soybeans. The government allocates limited credit to the farmers and they in turn prefer to use it for rice. Despite Indonesia's attempts to increase peanut production through research into improved varieties and inputs, average yields have remained stable. Production increases have come from a slow upward trend in area. Limited prime cropland is under significant pressure from alternative uses, including industrial and urban development.

## ARGENTINA

Prospects for Argentina's 1991/92 peanut crop are good; however, yields are not expected to repeat last year's excellent harvest. This season's yield potential is only slightly less than the 1985/86-1989/90 average of 2.13 metric tons per hectare. Harvested area is estimated to be down 5 percent to 190,000 hectares. As a result, production is pegged at 400,000 tons, down 75,000 tons or 16 percent from last year. Cordoba province is the main growing area for peanuts and favorable returns last year made peanuts an attractive alternative crop for producers. Over the last 10 years there has been little stability in Argentine peanut area, with the maximum area at 233,000 hectares in 1986/87 and the minimum area at 125,000 hectares in 1982/83. Production levels have not been stable either, but a slight upward trend is evident if the 1988/89 drought-reduced year is ignored.

## SENEGAL

Senegal is Africa's number one peanut producer. Peanut production during 1991/92 is estimated to increase to nearly 0.7 million tons, up 4 percent from last year. This season's growing conditions have not improved yield prospects much above last year's reduced level due to inadequate moisture levels. Area planted decreased significantly after 1980/81, when farmers in the northern growing region opted to plant millet. Since then, area has remained relatively stable.

## THE GAMBIA

Peanut production in 1991/92 is estimated at 120,000 tons, up 60 percent from last year's crop. This season's yields are expected to recover somewhat from last year, but remain slightly below the 1985/86-1989/90 average of 1.29 metric tons per hectare. The entire country of The Gambia is located within the Senegal peanut basin. Approximately 25 percent of the Gambian peanut crop is sold in Senegal, where support prices are significantly higher.



## SUDAN

Sudanese 1991/92 peanut production is estimated at 400,000 tons, up 23 percent from last year. Sudan's peanut crop is grown primarily in the traditional rainfed region, with additional production in the irrigated subsector. Yields are expected to recover to near normal, rebounding from last year's poor rainfall during the growing season in both producing regions. Since 1980/81, total peanut area has decreased 40 percent due to a decline in the traditional rainfed region. Peanuts grown in the irrigated regions along the Blue, White, and Main Niles are grown for both export and local consumption.

## UNITED STATES

The National Agricultural Statistics Service (NASS) of the United States Department of Agriculture estimated 1991/92 U.S. peanut production up 37 percent from 1990/91 to a record 2.242 million tons. Harvested area is estimated at a record 795,000 hectares, up over 8 percent from 1990 and the largest since 1951. NASS reports favorable digging conditions offset much of the impact of dry weather on yields. The Southeastern States (Alabama, Florida, Georgia, and South Carolina), recovered from last season's drought stricken yields with production up 61 percent from 1990. Other important growing regions, such as Virginia, North Carolina, Oklahoma, and Texas are expected to achieve yields above last year.

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# World Peanut Harvested Area (1,000 hectares)

	1980/81	1981/82	1982/83	1983/84	1984/85	1985/86	1986/87	1987/88	1988/89	1989/90	1990/91	1991/92†
India	6,801	7,429	7,215	7,539	7,168	7,120	6,982	6,844	8,529	8,707	8,650	8,700
China	2,339	2,472	2,416	2,201	2,421	3,318	3,253	3,022	2,914	2,956	2,907	2,920
Senegal	1,064	1,080	1,121	937	874	607	808	846	903	784	915	900
United States	566	602	517	556	618	594	621	626	659	666	732	795
Nigeria	650	497	600	600	550	520	660	800	700	700	740	750
Indonesia	508	461	480	523	510	515	516	550	608	612	625	645
Burma	514	598	571	561	647	595	564	537	530	523	556	550
Zaire	480	496	510	524	524	524	524	530	530	530	530	530
Sudan	894	998	782	770	735	400	540	575	575	550	540	530
Cameroon	363	311	315	300	300	320	320	320	320	320	320	320
Vietnam	119	130	141	170	180	190	195	285	290	300	300	300
Burkina	140	140	140	140	140	180	230	230	250	230	220	225
Zimbabwe	240	255	192	151	133	153	202	211	208	193	201	204
Argentina	197	166	125	146	143	168	233	192	150	180	200	190
Ivory Coast	65	93	70	101	118	117	125	136	142	148	150	153
Mozambique	180	170	170	120	140	140	150	150	150	150	150	150
Uganda	110	120	120	120	124	124	130	115	140	145	140	140
Central African Rep	122	129	100	116	116	125	125	135	135	130	130	130
Guinea	127	130	130	130	130	130	130	130	130	130	130	130
Thailand	100	117	117	120	125	123	125	118	118	120	122	123
Malawi	250	250	260	146	145	136	176	150	130	48	70	120
Chad	101	101	101	101	101	101	115	115	120	115	115	115
Niger	169	150	140	159	140	100	100	100	130	110	110	110
Mali	97	97	97	97	97	97	97	110	115	100	110	100
Gambia	83	93	123	110	110	110	80	95	95	98	80	95
Brazil	235	235	210	150	190	161	142	102	89	83	90	90
South Africa	289	238	227	238	230	221	207	153	153	88	86	90
Zambia	34	22	31	30	32	33	70	80	62	80	80	90
Tanzania	94	95	96	98	98	98	98	98	100	100	100	90
Ghana	109	105	80	80	80	80	90	100	100	90	90	90
Mexico	40	47	45	45	40	43	45	90	85	85	85	85
Benin	75	75	75	75	75	80	80	80	85	85	80	80
Guinea-Bissau	80	80	80	80	80	80	80	80	85	80	80	80
Pakistan	47	60	69	72	58	55	63	67	68	80	72	75
Burundi	30	30	30	30	30	30	40	65	70	72	70	70
Philippines	39	56	48	46	47	50	45	50	50	46	46	48
Togo	45	45	45	45	45	45	45	45	45	45	45	45
Bangladesh	24	22	21	32	28	30	30	38	38	40	42	43
Taiwan	51	51	46	52	53	49	50	59	40	32	41	41
Paraguay	25	37	37	37	39	40	32	28	41	38	39	39
Madagascar	36	32	32	32	33	33	34	31	34	34	34	35
Morocco	28	32	36	23	25	24	21	21	34	35	37	30
Turkey	19	25	24	24	23	21	22	32	30	28	25	30
Australia	27	33	36	32	30	29	37	32	22	18	22	20
Japan	33	32	30	30	29	27	24	23	21	19	18	18
Korea, Republic of	12	10	11	12	10	12	13	22	16	17	12	15
Bolivia	15	15	7	14	15	14	14	14	14	14	14	14
Egypt	18	12	12	11	13	14	15	14	12	13	12	13
Syria	11	9	10	10	10	9	10	10	11	12	11	12
Dominican Republic	28	28	23	21	21	20	24	21	18	7	9	11
Venezuela	6	4	5	5	3	4	4	7	8	6	5	6
Malaysia	6	6	6	6	6	6	6	6	6	6	6	6
Ecuador	13	13	13	9	12	8	9	5	5	5	5	5
Others 1/	15	15	13	13	15	14	15	14	13	11	11	10
Total Area	17,763	18,549	17,951	17,790	17,659	17,837	18,366	18,309	19,926	19,814	20,010	20,206



# World Peanut Yields (metric tons per hectare)

	1980/81	1981/82	1982/83	1983/84	1984/85	1985/86	1986/87	1987/88	1988/89	1989/90	1990/91	1991/92
Israel	5.20	4.29	4.40	4.40	4.40	4.60	4.60	4.20	4.75	5.00	6.67	6.67
Spain	2.50	2.50	2.00	2.00	2.00	2.50	3.00	3.00	4.00	4.00	4.00	4.00
United States	1.85	3.00	3.02	2.69	3.24	3.15	2.70	2.62	2.74	2.72	2.23	2.82
Korea, Republic of	2.08	2.40	2.46	2.42	2.60	2.67	3.08	2.46	3.00	2.82	2.42	2.80
Malaysia	2.33	2.33	2.33	2.33	2.33	2.33	2.33	2.33	2.33	2.33	2.50	2.50
Turkey	2.16	2.28	2.08	2.08	2.09	2.81	2.27	2.50	2.83	2.14	2.00	2.33
Venezuela	1.33	1.75	1.40	2.00	1.67	1.75	2.00	1.71	1.33	1.40	1.40	2.33
Egypt	1.83	1.92	2.00	1.82	2.69	2.64	2.67	3.00	3.08	2.23	2.17	2.31
Argentina	1.23	1.63	2.00	2.25	1.89	2.61	2.22	2.34	1.62	1.87	2.38	2.11
China	1.54	1.55	1.62	1.80	1.99	2.01	1.81	2.04	1.95	1.82	2.19	2.09
Syria	1.73	1.89	2.00	2.00	2.00	2.11	2.00	2.00	2.09	1.83	1.82	2.08
Soviet Union	1.00	1.00	1.00	1.00	2.00	2.00	3.00	2.00	2.00	2.00	2.00	1.94
Japan	1.67	1.91	1.57	1.63	1.76	1.89	1.96	2.00	1.52	1.95	2.22	2.00
Taiwan	1.61	1.63	1.37	1.67	1.68	1.57	1.66	1.70	1.85	1.81	1.90	1.90
Morocco	1.11	1.28	1.17	1.39	1.40	1.21	1.19	1.67	1.91	1.91	1.89	1.67
Brazil	1.32	1.30	1.19	1.47	1.77	1.34	1.37	1.67	1.75	1.65	1.67	1.67
South Africa	1.07	0.49	0.39	0.30	0.85	0.50	1.14	1.33	1.07	1.28	1.59	1.50
Australia	1.59	1.76	0.64	1.47	1.40	1.48	1.22	1.22	1.46	1.17	1.64	1.50
Indonesia	1.56	1.58	1.66	1.43	1.48	1.52	1.45	1.37	1.39	1.43	1.42	1.43
Thailand	1.29	1.26	1.24	1.23	1.38	1.40	1.35	1.37	1.39	1.34	1.33	1.33
Colombia	1.00	1.50	1.50	2.00	1.50	1.67	1.50	1.50	1.60	1.67	1.33	1.33
Gambia	0.72	1.17	1.23	1.03	1.09	1.14	1.38	1.26	1.32	1.33	0.94	1.26
Burundi	1.27	1.33	1.33	1.33	1.17	1.33	1.38	1.23	1.21	1.19	1.21	1.21
Bangladesh	1.00	1.05	1.10	1.03	1.14	1.13	1.13	1.26	1.18	1.18	1.19	1.21
Mexico	1.50	1.55	1.11	1.33	1.38	1.51	1.33	1.22	1.21	1.18	1.18	1.18
Bolivia	1.07	1.27	0.71	1.07	1.13	1.14	1.14	1.14	1.14	1.14	1.14	1.14
Central African Rep	1.01	0.97	1.28	0.99	1.12	1.12	1.12	1.04	1.11	1.08	1.08	1.12
Paraguay	1.00	0.97	1.00	1.00	1.08	1.00	1.25	1.25	0.61	1.08	0.90	1.03
Pakistan	1.21	1.20	1.22	1.22	1.19	1.15	1.19	0.78	1.15	1.03	1.14	1.01
Ecuador	0.85	0.77	0.85	0.89	0.83	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Dominican Republic	1.00	0.89	0.87	0.86	0.71	0.90	0.79	0.86	1.11	1.00	1.00	1.00
Madagascar	0.94	1.03	1.06	0.97	0.97	0.94	0.97	0.90	0.97	0.97	0.97	1.00
Vietnam	0.92	0.89	0.89	0.95	0.92	0.90	0.90	0.98	1.00	0.98	0.98	0.98
Ivory Coast	0.86	0.93	0.86	0.97	0.92	0.91	0.94	0.96	0.97	0.97	0.97	0.98
Mali	0.95	0.95	0.83	0.52	0.46	0.93	0.93	0.91	1.00	0.90	0.91	0.95
India	0.74	0.97	0.73	0.94	0.90	0.72	0.84	0.86	1.06	0.93	0.93	0.94
Burma	0.84	0.94	0.95	0.95	1.03	0.94	0.97	0.97	0.83	0.88	0.91	0.91
Benin	0.84	0.69	0.89	0.93	0.93	0.88	0.88	0.88	0.88	0.88	0.88	0.88
Philippines	0.77	0.88	0.75	0.91	0.89	0.88	0.91	0.80	0.76	0.76	0.80	0.79
Uganda	0.73	0.75	0.83	0.83	0.81	0.81	0.89	1.04	0.71	0.76	0.79	0.79
Togo	0.67	0.67	0.67	0.67	0.67	0.78	0.78	0.78	0.78	0.78	0.78	0.78
Senegal	0.49	0.81	0.99	0.61	0.64	0.97	1.01	1.10	0.76	1.04	0.73	0.77
Sudan	0.79	0.74	0.64	0.54	0.53	0.69	0.70	0.76	0.78	0.73	0.60	0.76
Ghana	0.41	0.40	0.43	0.45	0.45	0.63	0.67	0.70	0.80	0.78	0.78	0.72
Zaire	0.67	0.70	0.70	0.70	0.72	0.72	0.73	0.72	0.72	0.72	0.72	0.72
Chad	0.69	0.69	0.69	0.69	0.69	0.69	0.70	0.70	0.75	0.70	0.70	0.70
Burkina	0.50	0.55	0.55	0.57	0.50	0.71	0.70	0.64	0.72	0.70	0.70	0.69
Guinea	0.67	0.65	0.65	0.65	0.65	0.65	0.65	0.65	0.65	0.65	0.65	0.65
Tanzania	0.60	0.61	0.60	0.60	0.61	0.61	0.61	0.61	0.55	0.55	0.60	0.56
Niger	0.75	0.80	0.57	0.47	0.21	0.40	0.60	0.45	0.62	0.55	0.55	0.55
Nigeria	0.82	0.86	0.66	0.99	0.91	0.77	0.51	0.59	0.50	0.50	0.50	0.53
Uruguay	1.00	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50
Zimbabwe	0.54	0.45	0.17	0.27	0.51	0.48	0.25	0.37	0.44	0.49	0.47	0.47
Malawi	0.72	0.68	0.65	0.37	0.38	0.46	0.50	0.37	0.22	0.40	0.49	0.47
Mozambique	0.50	0.47	0.47	0.54	0.46	0.46	0.47	0.47	0.47	0.47	0.47	0.47
Zambia	0.59	0.59	0.36	0.43	0.47	0.55	0.43	0.44	0.45	0.31	0.44	0.44
Cameroon	0.30	0.28	0.29	0.40	0.37	0.44	0.44	0.44	0.45	0.44	0.44	0.44
Guinea-Bissau	0.25	0.38	0.38	0.28	0.38	0.38	0.38	0.38	0.41	0.38	0.38	0.38

TABLE 14

# World Peanut Production (1,000 metric tons)

	1980/81	1981/82	1982/83	1983/84	1984/85	1985/86	1986/87	1987/88	1988/89	1989/90	1990/91	1991/92 <sup>1</sup>
India	5,005	7,223	5,282	7,086	6,436	5,120	5,875	5,854	9,000	8,088	8,080	8,200
China	3,600	3,826	3,916	3,951	4,815	6,664	5,882	6,170	5,693	5,365	6,368	6,100
United States	1,045	1,806	1,560	1,495	1,999	1,870	1,677	1,640	1,806	1,810	1,634	2,242
Indonesia	791	728	795	747	755	780	750	786	843	875	890	920
Senegal	521	878	1,109	568	560	587	817	932	690	815	670	695
Burma	431	564	541	532	667	560	544	519	438	459	505	500
Nigeria	530	428	396	591	500	400	400	475	350	350	370	400
Argentina	243	270	250	329	270	439	518	450	243	336	475	400
Sudan	707	740	497	413	390	275	380	435	450	400	325	400
Zaire	320	347	357	367	375	375	380	380	380	380	380	380
Vietnam	110	116	126	162	165	170	175	280	290	295	295	295
Thailand	129	147	145	147	172	172	169	162	164	161	162	164
Burkina Faso	70	77	77	80	70	128	160	146	180	160	150	155
Brazil	310	305	250	220	337	216	195	170	156	137	150	150
Ivory Coast	56	86	60	98	108	106	118	130	137	144	146	150
Central African Rep	123	125	128	115	130	140	140	140	150	140	140	145
Cameroon	110	87	90	120	110	140	140	140	145	140	140	140
South Africa	309	116	89	72	196	111	235	204	163	113	137	135
Gambia	60	109	151	113	120	125	110	120	125	130	75	120
Uganda	80	90	100	100	100	100	115	110	100	110	110	110
Mexico	60	73	50	60	55	65	60	110	103	100	100	100
Zimbabwe	130	115	32	41	68	73	51	79	91	95	94	96
Mali	92	92	80	50	45	90	90	100	115	90	100	95
Guinea	85	85	85	85	85	85	85	85	85	85	85	85
Burundi	38	40	40	40	35	40	55	80	85	86	85	85
Chad	70	70	70	70	80	70	80	100	90	80	80	80
Taiwan	82	83	63	87	77	77	83	100	74	58	78	78
Pakistan	57	72	84	88	69	63	75	52	78	82	82	76
Benin	63	52	67	70	70	70	70	70	75	75	70	70
Mozambique	90	80	80	65	65	65	70	70	70	70	70	70
Turkey	41	57	50	50	48	59	50	80	85	60	50	70
Ghana	45	42	34	36	36	50	60	70	80	70	70	65
Niger	126	120	80	74	30	40	60	45	80	60	60	60
Malawi	180	170	170	54	55	62	88	55	28	19	34	56
Bangladesh	24	23	23	33	32	34	34	48	45	47	50	52
Tanzania	56	58	58	59	60	60	60	60	55	55	60	50
Morocco	31	41	42	32	35	29	25	35	65	67	70	50
Korea, Republic of	25	24	27	29	26	32	40	54	48	48	29	42
Zambia	13	13	11	13	15	18	30	35	28	25	35	40
Paraguay	25	36	37	37	42	40	40	35	25	41	35	40
Philippines	30	49	36	42	42	44	41	40	38	35	37	38
Japan	55	61	47	49	51	51	47	46	32	37	40	35
Togo	30	30	30	30	30	35	35	35	35	35	35	35
Madagascar	34	33	34	31	32	31	33	28	33	33	33	35
Egypt	33	23	24	20	35	37	40	42	37	29	26	30
Australia	43	58	23	47	42	43	45	39	32	21	36	30
Guinea-Bissau	20	30	30	22	30	30	30	30	35	30	30	30
Syria	19	17	20	20	20	19	20	20	23	22	20	25
Israel	26	30	22	22	22	23	23	21	19	20	20	20
Bolivia	16	19	5	15	17	16	16	16	16	16	16	16
Malaysia	14	14	14	14	14	14	14	14	14	14	15	15
Venezuela	8	7	7	10	5	7	8	12	17	14	10	14
Dominican Republic	28	25	20	18	15	18	19	18	20	7	9	11
Ecuador	11	10	11	8	10	8	9	5	5	5	5	5
Others 1/	14	12	10	11	14	14	17	16	16	13	12	11
Total	16,271	19,832	17,435	18,738	19,684	19,990	20,383	20,978	23,280	22,052	22,883	23,511

1/ Peanut production or area harvested is estimated to be less than 5,000 tons or hectares during 1991/92.

November 1991

Production Estimates & Crop Assessment Division, FAS, USDA



## WORLD PISTACHIO PRODUCTION

The world's leading commercial producers, other than Iran, of pistachio nuts are expected to harvest a combined 1991/92 crop of 89,900 tons (in-shell basis), marginally below the 1990/91 level. With pistachios, the most significant determinants of annual crop size are the alternate bearing factor, weather conditions, and bearing tree numbers. The 1991/92 season is an off-year in the bearing cycle for the United States. The U.S. crop is forecast at 21,800 tons, 59 percent smaller than last year's record harvest, but potentially the largest off-year crop to date, primarily because good weather conditions moderated the impact of the alternate bearing factor. U.S. nut sizes are reportedly large and kernal quality excellent. Even though it is also an off-year in Syria, the 1991/92 crop is expected to total a record 22,000 tons, due to a 17 percent increase in bearing tree numbers, improvements in cultivation techniques, and strong producer prices.

Current assessments indicate pistachio production in Turkey during the 1991/92 season will reach an all-time high of 40,000 tons, nearly 3 times larger than last year's off-year crop, and 14 percent above the previous record set in 1989/90. Significant factors contributing to the increase are highly favorable growing conditions and the coming into bearing of an additional 500,000 trees. Italy's 1991/92 harvest is forecast at 4,000 tons, 21 percent above the previous on-year crop in 1989/90. Among commercial pistachio producers, Italian crops exhibit the most pronounced cyclical fluctuation. Traditional cultivation practices call for growers to radically prune trees in the spring of every off-year in order to boost production during on-years. The long-term production outlook is for minimal growth with future crops ranging from off-year lows of 300 tons, to an occasional on-year high of 4,500 tons--equal to the record crop harvested during the 1981/82 season. Reportedly, the Greek pistachio crop was adversely affected by heavy rainfall that caused widespread disease problems and significantly reduced kernel quality. What should have been a bumper on-year crop is currently forecast at only 2,100 tons, down 19 percent from a year ago and 57 percent below the previous on-year crop in 1989/90 that totaled a record 4,900 tons.

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TABLE 15

WORLD PISTACHIO PRODUCTION  
(1,000 Metric Tons/In-shell Basis)

	<u>1987/88</u>	<u>1988/89</u>	<u>1989/90</u>	<u>1990/91</u>	<u>1991/92</u> <u>1/</u>
Greece	4.0	3.0	4.9	2.6	2.1
Italy	4.0	0.3	3.3	0.3	4.0
Syria	12.5	17.9	15.8	20.0	22.0
Turkey	25.0	15.0	35.0	14.0	40.0
United States	15.0	42.6	17.7	53.5	21.8
TOTAL	60.5	78.8	76.7	90.4	89.9

NOTE: Iran is excluded from this report due to lack of current, verifiable information.

1/ Preliminary.

November 1991

Production Estimates And Crop Assessment Division, FAS, USDA



## WORLD WALNUT PRODUCTION

World commercial production of walnuts during the 1991/92 season is forecast at 485,800 tons (in-shell basis), marginally above the 1990/91 level. A record crop of 226,800 tons is anticipated in the United States due to an exceptionally high nut set. In China, production is expected to increase by 2 percent to 152,500 tons--a disappointing recovery in view of the significant production increases recorded during the last half of the 1980's. Extremely dry weather in two of the largest producing provinces, Shanxi and Shaanxi, reduced production potential but, reportedly, had little impact on quality. Walnut production in Turkey is forecast at 66,000 tons, up 1,000 tons from last season, but significantly below the 100,000 ton crops prevalent during the 1970's. The Turkish walnut industry has been in a state of decline for nearly 15 years. During the mid-1980's, high domestic prices for walnut lumber encouraged tree fellings. In most years, removals exceeded plantings. However, in 1989, lumber prices plummeted while nut prices rebounded to very attractive levels. Removals slowed and plantings resumed. Since 1989, the outlook has brightened due to steady growth in crop levels and both non-bearing and total tree numbers.

Significantly smaller walnut crops are forecast for France, India, and Italy during the 1991/92 season. French walnut production is forecast at 11,500 tons, 53 percent below a year ago, due to severe frost damage. Production in the southwest Bordeaux/Perigueux region is projected at 2,000 tons, down from a normal crop of about 15,000 tons. The Grenoble region in the southeast sustained less freeze damage and is expected to harvest a 1991/92 crop of 8,500 tons compared to approximately 10,000 tons in a more normal year. An unusually cold winter, followed by unseasonably dry weather during the bloom and fruit formation stages, is expected to reduce walnut output in India by 15 percent. Production for 1991/92 is forecast at 17,000 tons, down 3,000 from a year ago. Walnut production in Italy is forecast at 12,000 tons, 33 percent smaller than the previous two crops. Excessive rains and unseasonably cold temperatures precipitated widespread outbreaks of fungal diseases causing heavy losses and quality problems in most orchards. Nuts harvested from orchards that escaped damage are reportedly of good quality.

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TABLE 16

WORLD WALNUT PRODUCTION  
(1,000 Metric Tons - In-shell Basis)

	<u>1987/88</u>	<u>1988/89</u>	<u>1989/90</u>	<u>1990/91</u>	<u>1991/92</u> <u>1/</u>
China	147.2	177.1	160.1	149.6	152.5
France	26.5	22.8	25.8	24.6	11.5
India	20.0	18.0	17.0	20.0	17.0
Italy	20.0	11.0	18.0	18.0	12.0
Turkey	65.0	64.0	64.0	65.0	66.0
United States	224.1	189.6	207.8	205.9	226.8
TOTAL	502.8	482.5	492.7	483.1	485.8

1/ Preliminary.

November 1991

Production Estimates And Crop Assessment Division, FAS, USDA



## WORLD DRIED PRUNE PRODUCTION

Northern Hemisphere production of dried prunes during the 1991/92 season is forecast at 200,460 tons (packed weight basis), up 10 percent from a year ago. The increase reflects projections of a significantly larger pack in the United States where growing, harvesting, and drying conditions were reportedly conducive to producing a good quality pack of 171,460 tons.

Dried prune production in France is forecast at 25,000 tons, down nearly one-third from last season, primarily due to freezing temperatures during the April blossoming period. Abnormally cold, wet weather during May, and excessive dryness during August, further reduced yields. Overall, the quality of the 1991/92 pack is good, but, because of the August drought, average fruit sizes are reportedly smaller. The bulk of the pack is expected to fall in the "medium" size category of 66-68 fruits per 550 grams, instead of the 60 fruit per 500 gram category characteristic of a more normal year.

Dried prune production in Yugoslavia continues to trend downward. The 1991/92 pack is expected to total only 4,000 tons, down 24 percent from a year ago, and potentially the smallest produced since the 1955/56 pack of 1,370 tons. The projected downturn this season reflects: a shortage of fresh plums for drying due to weather damage and disease problems; the continuing diversion of fresh plums for brandy production because of higher prices; severe fuel shortages in Serbia and the two major producing provinces of Bosnia and Herzegovina; an overvalued currency that makes export prices too low to cover production costs; and, poor export prospects due to continuing trade problems with the Soviet Union. No turnaround in the situation is anticipated in the near future.

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TABLE 17

WORLD PRODUCTION OF DRIED PRUNES  
(Metric Tons-Packed Weight Basis)

	<u>1989/90</u>	<u>1990/91</u>	<u>1991/92</u> <u>1/</u>
<u>NORTHERN HEMISPHERE</u>			
France	19,949	36,745	25,000
Yugoslavia	12,148	5,239	4,000
United States	215,275	140,025	171,460
Total	247,372	182,009	200,460
<u>SOUTHERN HEMISPHERE</u>			
Argentina <u>2/</u>	8,000	9,000	N/A
Australia <u>2/</u>	2,700	2,800	N/A
Chile <u>2/</u>	13,800	11,500	N/A
South Africa <u>3/</u>	3,512	2,120	N/A
Total	28,012	25,420	N/A
WORLD TOTAL	275,384	207,429	N/A

1/ Preliminary.

2/ Estimate as of May 1991.

3/ Revised November 1991.

November 1991

Production Estimates and Crop Assessment Division, FAS, USDA



## CHINESE FEED AND LIVESTOCK OUTLOOK

A technical exchange team, led by a USDA specialist, traveled to China during late August and early September. The trip was made under the auspices of the U.S./China Scientific and Technical Exchange Program. The team's objective was to gather information on China's livestock production, including structure, marketing, prices, policies, feed use, etc., that would provide a basis for anticipating likely development during the 1990's. The team's itinerary included stops in Beijing, Huhhot, Nanjing, Shouzhou, Shanghai, Guangzhou, and Sengzheng. Appointments included talks with government officials at the national, provincial, and county levels and visits to research institutes, livestock production units, and feed mills.

This report summarizes team findings and implication of those findings. Since the information received by the team was neither complete nor fully harmonious, there was considerable need for interpretation. In presenting implications, the approach of this report is to bracket likely developments by the mid-1990's rather than attempt to develop precise projections. The following table details recent development of China's livestock and commercial feed sector.

### CHINA: OUTPUT OF LIVESTOCK PRODUCTS AND MANUFACTURED FEED (million metric tons)

	Beef	Pork	Sheep & Goat Meat	Poultry Meat	Eggs	Milk	Manufactured Feed <u>1/</u>
1986	0.59	17.96	0.62	1.88	5.55	2.86	18.00
1987	0.79	18.35	0.72	2.04	5.90	3.30	22.51
1988	0.96	20.18	0.80	2.74	6.96	3.66	29.57
1989	1.07	21.23	0.96	2.84	7.20	3.81	31.00
1990	1.26	22.81	1.07	3.32	7.95	4.13	31.00
1991 <u>2/</u>	1.43	23.30	1.15	3.60	8.55	4.40	NA

Source: All data are published USDA/FAS estimates except manufactured feed which was published by ERS.

NA. Not available.

1/ Data do not cover small mills. The estimate for 1990 was obtained by the team.

2/ Forecast.

Probably the most important factor affecting the development of the feed and livestock industries is the pace of price reform. Wherever price reform was mentioned, Chinese contacts said that the process would continue. Most contacts, both government and private, asserted that within 10 years all prices in the feed-livestock complex would be market prices. However, discussion as to what current price levels are, how price information flows, and what changes are expected under a system of market prices usually were very inconclusive. Some contacts said that they use Shanghai wholesale prices while others said there were regular price publications; however, no copies were available for the team.

In addition to the apparent lack of price information, Chinese feed mill managers demonstrated considerably less sensitivity to prices and price changes compared to managers in western countries. All feed mill managers visited said they rarely change feed mixtures to reflect changes in ingredient prices. There is, of course, less incentive to change mixtures because profit percentages and some ingredient prices are under government "guidance" which discourages flexibility.

The outlook for pork, the most important livestock enterprise in China, is blurred by inconsistencies in the system of subsidies used by the national, provincial, county, and township level governments. Although there is supposed to be fairly uniform national programs in operation, it seemed that many local and provincial governmental units have reserved for themselves some rights to add or subtract from the subsidies. Thus, the stated national policy to slow expansion of the hog industry in favor of poultry production is being partially frustrated by city plans to ensure pork for their residents and by township and county plans to spur or retard certain types of economic development.

The hog industry seems likely to continue expanding at near historical rates, i.e., expansion of half to 1 million tons of pork per year for the next 4 or 5 years. Structural changes relative to the way hogs are raised will likely include more private commercial raisers, mostly farmers who fatten 50 or more pigs per cycle. There will continue to be a shift to western breeds or to cross breeds with a higher percentage of western genetics. Large litter sizes are the major feature of Chinese breeds that breeding farms are attempting to retain. Western breeds offer faster, more efficient growth for the producer and leaner meat for the consumer. A shift to western breeds will bring an increase in feed efficiency, allowing some expansion of pork output without a commensurate increase in feed input.

The major uncertainty in the outlook for the hog sector is what will happen when China switches to free market prices for both hogs and feeds. Currently, pork is produced by a wide variety of farm sizes and ownership patterns. The team heard claims that the large (commercial) State farms lose money even in the best of years. The small sample of private farms visited seemed to prefer selling to the State buying agency. Also, at various locations, aspects of the system of State buying of pork at set prices, (generally below what was called the free market price) and of State subsidies on feed were discussed, but the team was never given a complete detailed explanation of how the system operates. It is likely that one detailed explanation would not have been useful anyway because, as mentioned, each governmental level seems to have some say as to when and how much subsidies are paid. In any case, the team was told that in every region, some portion of production is at negotiated or free market prices for both the feed used and the pork produced. Thus, it seems likely that although a switch to free market prices for hogs and feed will involve some new price relationships between feed and pork and between pork and other meats, continued strong demand growth will override any temporary imbalances that develop.



Poultry meat production is likely to expand rapidly but not at explosive rates as some have predicted and as some in the Chinese Government would like to see. Output of western type broilers has grown rapidly in the past few years but Chinese analysts said most of these broilers are either for export or for tourist hotels. Several analysts said the general populace has not accepted western style broilers and still prefers "native" chicken meat which sells for prices that are 50 percent or more above those of western type broilers. Poultry meat expansion is likely to average 300,000 to 500,000 tons per year, somewhat above historical rates, due to growing demand and government incentives to production. However, unless consumer tastes change rapidly, the mix between native and western breeds is likely to show little change. This implies that a rapid increase in feed efficiency is unlikely.

The beef sector should continue to expand at historical rates despite the potential to use concentrate feed and sharply increase beef production without expanding the cow herd. Discussions about this possibility (with one exception) were never met with any enthusiasm, but were rebutted with talk about poor economics and the difficulty of changing traditional patterns of production. As if to prove the point, both dairy farms visited sell all their male calves to drug manufacturing firms rather than to feeders. Dairy farms in northeastern China were said to sell their surplus calves to feeders. With slow expansion of beef production and the ability of beef to utilize a wide range of non-concentrates, it seems unlikely that growth in beef production will have a significant impact on feed demand during the next 4 to 5 years.

Before 1990, milk production had shown one of the fastest growth rates within the livestock sector. However, slower growth characterized 1990 and early 1991. Discussions with Chinese officials seemed to confirm that growth in demand for milk has slowed and may not go back to the previous rapid rates of expansion. Future growth in milk demand will depend on price and income relationships rather than expanding distribution to under-served areas as was partially the case before 1990. On the other hand, compared to many other countries, per capita consumption in China is still very low. Thus, improved incomes may continue to generate significant increases in milk demand. In addition, production and consumption of dairy products are very low and could be another source of strong demand for milk.

Egg production, like dairy production, could expand at a more moderate pace in the near future. Consumption, estimated at over 150 eggs per capita, is approaching the level of Taiwan and South Korea, signifying that demand growth might soon start to slow. On the other hand, production growth has been very strong during the past 5 years. Eggs are produced in significant quantities by both backyard operators and commercially sized State and private farms. Therefore, unless free market prices involve a greatly different feed/egg price relationship, egg production trends probably will not be significantly affected when China switches to free market prices.

The outlook for the manufactured feed industry is difficult to project due, in part, to the lack of reliable data on the present situation. In asking about the size of the industry the team received several different estimates of 1990 production. The most common answer seemed to be that in 1990, 6,200 feed plants (with more than 1 ton per hour capacity) produced 31 million tons of feed. Later discussions indicated that this total includes compound feeds, pre-mixes, concentrates, and simple mixtures. In addition, there were some estimates that the smaller feed mills (less than 1 ton per hour capacity)

produced 9 million tons, bringing China's 1990 total to 40 million tons. Feed milling capacity was listed at 50 million tons for the 6,200 larger mills. Several years ago, plans were announced for future expansion of milling capacity to 60 million tons in 1995 and 100 million ton in the year 2000. On this trip, Ministry of Commerce Officials (who control most of the milling capacity) said they expect capacity to expand 7 to 9 percent a year during the next 5 years. That indicates that rather than 10 million tons of new capacity as suggested by the older plan, there might be an additional 20 or 25 million tons by 1995. Neither government officials nor feed mill operators thought that the physical availability of ingredients would be a serious problem during the next 5 years. However, both sources did mention that there have been some jurisdictional problems with buying from other provinces.

Developments in 1990 and 1991 add another element of uncertainty to the outlook for the manufactured feed sector. At the national level, the team was told that feed demand is very strong with implications that 1990 production was up and 1991 output also will be up. However, the team's limited survey at the provincial and subprovincial level indicated that production was down in 1990 and that 1991 production is expected to be about the same level. Explanations given for the decline usually included 2 factors--weak prices for hogs and expanded use of pre-mixes by individual farmers. Detracting from the first reason is the fact that, low prices or not, pork production was up 7 percent in 1990 and a further 2 percent increase is expected in 1991. Output of poultry meat and eggs were each up 13 percent in 1990, with further significant growth forecast for 1991.

With the foregoing introduction and qualifications, the outlook for the feed industry and the use of grain and high protein meal by that industry can be estimated in two ways. In the macro sense, if capacity increases about 25 million tons (8 percent per year), production stays at 60 percent of capacity, grain use continues to account for about 60 percent of feed ingredients, and high protein meals 20 percent, then 1995 feed production will increase 15 million tons from the 1990 levels. This would require an additional 9 million tons of grain and 3 million tons of high-protein meals. This probably represents a near minimum of likely outcomes because it essentially assumes that the commercial feed industry develops at historical rates of physical growth and does not significantly increase its share of the total feed market. Most Chinese contacts indicated that an increased share for the commercial feed sector was both likely and a desirable policy goal.

If likely animal production developments based on recent trends are used to estimate feed demand and the commercial feed industry provides for half the increase, then the outcome is much larger. However, during the last 5 years, growth in most livestock sectors has been extremely rapid and projected feed use based on these growth rates probably should be viewed as a near maximum of likely outcomes.

With continued patterns of growth in livestock, additional feed use can be estimated as follows. In the pork sector, a 3 million ton increase in meat production translates to a near 5 million ton increase in live weight production. If half the additional pork is dependent on the commercial feed industry, then (with an efficient 4 to 1 conversion ratio) an additional 10 million tons of manufactured feed are needed. For poultry meat, a production increase of 2 million tons by 1995 means a live weight increase of almost 3



million tons. Assuming half of that increase depends on the commercial feed industry, and a relatively poor 3 to 1 conversion ratio due to the continued proportion of native breeds, then 4-5 million more tons of feed are needed for poultry meat production. Egg production increasing at about half a million tons per year and feed conversion around 3 million would mean that an additional 3-4 million tons of feed were needed by the egg sector. Thus an additional 7-9 million tons of commercially mixed feed would be required for poultry meat and egg production. Continued rapid growth in aquacultural production and further expansion in dairy output could create demand for another 4-5 million tons of commercial feed by 1995.

Summarizing, the above calculations indicate that under certain conditions, rapid increases in livestock output could require an additional 22 million tons of manufactured feed by 1995, which in turn would require an additional 13 million tons of grain and 4-5 million tons of high protein meals. These totals are approximately 50 percent larger than the feed production and ingredient use levels implicit in the government's plans for 7-9 percent growth in feed milling capacity. As a consequence, if rapid increases in livestock production are to continue, faster development of the feed industry and new sources of feed ingredients may be needed.

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## WORLD COTTON PRODUCTION

World cotton production for 1991/92 is projected at 91.6 million bales, well above the 87.0 million of last year. About 87 percent of the increase in cotton output is estimated to come from the world's two top producers: China and the United States. This article will highlight the top seven producing nations: China, United States, Soviet Union, India, Pakistan, Brazil, and Turkey. Countries were ranked based on estimated production data for 1991/92. Each country produces in excess of 2.5 million 480-pound bales annually. Together, they will produce an estimated 75.2 million bales, or 82 percent of the world's cotton.

China, the largest cotton producer in the world, grows almost a quarter of the global output. Production for 1991/92 is estimated at 22.0 million bales with yields well above the world average. Cotton area is estimated at 6.0 million hectares, an increase of 7 percent over 1990/91. About 60 percent of China's cotton is grown in the North China Plain, especially in Shandong, Henan, and Hebei provinces. The remainder of the crop is grown in the northwest and the Yangtze River Valley, where yields are higher than in the north because of a longer growing season. In early July, serious flooding in the Yangtze and Huai River Valley caused significant cotton losses in Hubei province and moderate losses in Henan, Anhui, and Jiangsu provinces. Despite the flood damage, good yields are still expected because of favorable summer weather in the North China Plain and Northwest cotton areas, additional inputs, and better management. Warm, dry weather since September in most cotton areas has boosted the quantity and quality of the 1991/92 crop.

The United States is currently the second largest cotton producer in the world. Production for 1991/92 is estimated at a near-record level of 18.2 million bales, up 18 percent from last year. The United States was the world's leader in cotton output prior to 1983/84. Since then it has been consistently surpassed by China, but has distanced itself from the Soviet Union for the number two position. Over the past 5 years, the United States annual production averaged 13.5 million bales. The 1991/92 season commenced with a drought in California and wet conditions in the South. As the season progressed, growing conditions improved. Cold, wet weather during late October and early November delayed harvest and deteriorated cotton quality across the Mississippi Delta. Mostly clear weather favored quality and harvesting across the Texas Plains, the southwest states, and the southeast.

The Soviet Union ranks behind China and the United States in cotton production. Production for 1991/92 in the USSR is estimated at 11.0 million bales, down more than 8 percent from last year. Cotton is grown only under irrigation in five Soviet republics of Central Asia--Uzbekistan, Turkmenistan, Tadzhikistan, Kazakhstan, and Kirgizia--and in Azerbaidzhan of the Transcaucasian region. Historically, Uzbekistan has accounted for approximately two-thirds of the total Soviet output. The area planted to cotton is around 3.0 million hectares, down 5 percent from last year as food and feed crops were planted in the place of cotton. The increase in the production of food and feed crops is necessary to enhance local food supplies and improve soil and water conservation practices. Efforts are being made to offset the drop in cotton area through improvement of yields.



India is currently the fourth largest producer of cotton in the world. The 1991/92 output is estimated at 10.0 million bales, up 865,000 bales from last year's disappointing harvest. It has the largest area planted to cotton, amounting to roughly 21 percent of the world total. Yields are among the world's lowest, estimated at only 298 kilograms per hectare. Because of this, India will contribute just 11 percent of world lint output this year. The summer monsoon plays a key role in cotton productivity and crop size in most growing areas, since only 20 percent of the total area is under irrigation. The 1991/92 monsoon season has been mixed, but generally favorable for the current cotton crop. Rainfall deficiencies have occurred in important growing areas of Gujarat and Maharashtra but reports elsewhere indicate excellent crop conditions.

Pakistan is currently the fifth largest producer of cotton in the world. Production is expected to be a record 7.8 million bales in 1991/92. This will account for 9 percent of the world's cotton. The Pakistani cotton crop is well insulated from rainfall deficiencies, with nearly all cotton acreage in the vast Indus River Plain under irrigation. Its irrigation resources have enabled the country to achieve more than double the average cotton yield of neighboring India, with 1991/92 yields forecast at 612 kilograms per hectare. Pakistan is cultivating a record cotton area this season, at an estimated level of 2.8 million hectares.

Brazil is currently the sixth largest cotton producer in the world and the largest producer in South America. Cotton production in 1991/92 is forecast to reach 3.5 million bales, 13 percent above last year. Area is currently forecast at 2.0 million hectares, slightly larger than last year. The area devoted to cotton is almost entirely determined by the relative price of competing crops and the amount of credit made available by the government. The Government of Brazil announced on October 10 a new production credit measure intended to encourage producers to increase planted area and input utilization. Some debate exists over what impact the government's recently announced agricultural policy package will have on planted area this year. Dry conditions are creating some delays in land preparation and cotton planting progress is behind normal in the principal producing states of Parana and Sao Paulo. Continued dry conditions could cause some land to shift from cotton to corn or soybeans.

Turkey is the seventh largest cotton producer in the world, producing 3 percent of the world's total. The cotton growing areas are Cukurova and Southeast Anatolia, the Aegean region in Western Anatolia, and Antalya, located in Southern Anatolia. Cotton production for 1991/92 is estimated at 2.7 million bales, slightly below the record production of last year. Area is estimated to decrease 4 percent while the yield is expected to decrease 6 percent. Rains in early June delayed planting and necessitated some replanting. This delayed crop maturity pushed the harvest into the fall where rains in late September and early October hampered harvest operation.

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TABLE 18

## MAJOR COTTON PRODUCERS

1991/92	480-lb BALES (1,000)	PERCENT OF PRODUCTION	YIELD (Kg/Ha)	AREA HARVESTED (1,000 Ha)	PERCENT OF AREA	LINT THOUS. MT
WORLD	91,587	100	583	34,205	100	19,941
TOP SEVEN	75,215	82	603	27,155	79	16,376
China	22,000	24	798	6,000	18	4,790
United States	18,215	20	727	5,455	16	3,966
USSR	11,000	12	796	3,010	9	2,395
India	10,000	11	298	7,300	21	2,177
Pakistan	7,800	9	612	2,775	8	1,698
Brazil	3,500	4	381	2,000	6	762
Turkey	2,700	3	956	615	2	588
Other	16,372	18	506	7,050	21	3,565
1990/91						
WORLD	86,958	100	573	33,055	100	18,933
TOP SEVEN	70,941	82	590	26,162	79	15,446
China	20,700	24	807	5,588	17	4,507
United States	15,499	18	711	4,748	14	3,375
USSR	12,000	14	827	3,160	10	2,613
India	9,135	11	270	7,355	22	1,989
Pakistan	7,513	9	607	2,693	8	1,636
Brazil	3,087	4	340	1,977	6	672
Turkey	3,007	3	1,021	641	2	655
Other	16,017	18	506	6,893	21	3,487

## CHANGE FROM 1990/91

	480-lb BALES (1,000)	CHANGE FROM YEAR EARLIER (PERCENT)	SHARE OF CHANGE (PERCENT)	AREA HARVESTED (1,000 Ha)	CHANGE FROM YEAR EARLIER (PERCENT)	SHARE OF CHANGE (PERCENT)
WORLD	4,629	5	100	1,150	3	100
TOP SEVEN	4,274	6	92	993	4	86
China	1,300	6	28	412	7	36
United States	2,716	18	59	707	15	61
USSR	-1,000	-8	-22	-150	-5	-13
India	865	9	19	-55	-1	-5
Pakistan	287	4	6	82	3	7
Brazil	413	13	9	23	1	2
Turkey	-307	-10	-7	-26	-4	-2
Other	355	2	8	157	2	14



## WORLD RAISIN/SULTANA PRODUCTION

The 1991/92 raisin/sultana pack in the major Northern Hemisphere countries is forecast at 455,990 tons (packed weight basis), 14 percent below the 1990/91 level, due to smaller than anticipated output in the United States, Turkey, and Mexico. The U.S. pack is forecast at 266,990 tons, down 20 percent from a year ago. The decline can be attributed to a series of weather anomalies in California's major growing areas that adversely affected the grape crop. Late season rains damaged blossoms, below-normal spring temperatures slowed crop maturity, and record high temperatures in July severely burned grape clusters. Excellent weather during harvesting, laying, and drying prevented further losses.

Sultana production in Turkey is forecast at 140,000 tons, 4,000 tons less than the 1990/91 volume. Vacillating temperatures and persistent rains from May through July reduced both yields and berry size. Dry weather during August and early September allowed growers to harvest and dry the bulk of the crop without incident. However, the onset of cool, wet weather in mid-September panicked many growers into marketing their remaining supplies as table grapes, thus further reducing the dried pack.

Mexico's raisin pack is expected to total only 9,000 tons, 28 percent below the 1990/91 volume. The decline reflects the continuing rise in production costs, yield reductions caused by rain during the drying season, and diversion of raisin-type grapes to the more lucrative wine sector.

The 1991/92 sultana pack in Greece is forecast at 40,000 tons, up 8 percent from last year, but significantly below potential, due to the phyloxera problem and the higher prices being offered this season by fresh market wholesalers and wineries. However, current assessments indicate that, as the rootstock replacement program brings the phyloxera disease under control, Greek sultana production should recover to a more normal level of 70,000-80,000 tons.

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TABLE 19

WORLD PRODUCTION OF RAISINS/SULTANAS  
(Metric Tons)

	<u>1989/90</u>	<u>1990/91</u>	<u>1991/92</u> <u>1/</u>
<u>NORTHERN HEMISPHERE</u>			
Greece	83,580	37,000	40,000
Mexico	7,000	12,500	9,000
Turkey	138,000	144,000	140,000
United States	366,665	335,115	266,990
Total	595,245	528,615	455,990
<u>SOUTHERN HEMISPHERE</u>			
Argentina <u>2/</u>	7,500	8,000	N/A
Australia <u>3/</u>	54,834	79,839	N/A
Chile <u>2/</u>	30,500	27,000	N/A
South Africa <u>3/</u>	34,104	30,572	N/A
Total	126,938	145,411	N/A
WORLD TOTAL	725,999	674,026	N/A

1/ Preliminary.

2/ Estimate as of May 1991.

3/ Revised November 1991.

NOTE: Data for Afghanistan and Iran not available.

November 1991

Production Estimates and Crop Assessment Division, FAS, USDA



## LATIN AMERICAN FORESTRY SITUATION

BRAZIL: The economic situation in Brazil is bleak. Rampant inflation, rising interest rates, soaring production costs, and recession in the construction and furniture industries continue to restrain growth in the forest products sector. Total fellings during 1991 are not expected to exceed the 1990 volume of 78.0 million cubic meters (CUM). Production of softwood logs and lumber, tropical hardwood logs and lumber, poles and pitprops, and railroad ties will reportedly remain stagnant at 1990 levels. Current assessments indicate that the panel products sector has not fared well amid the poor economic climate. Domestic and international pressures to preserve native stands in the Amazon, coupled with higher prices for resins and glues, have forced veneer and plywood plants utilizing tropical hardwoods to operate at only 50 percent of capacity for the past 2 years. Similarly, the retraction in the furniture industry has sharply reduced output of hardboard and particleboard. The outlook for 1991 envisions more idle production capacity and lower profits throughout the panel products sector.

CHILE: The Chilean forestry sector continues to expand. The 1991 annual cut is forecast at a record 18.2 million CUM, up 10 percent from last year. Fellings of softwood logs are expected to increase by 14 percent, to 8.2 million CUM, in response to strong demand from both the domestic construction industry and foreign markets. Production of softwood lumber is forecast at a record 3.1 million CUM, reflecting increased efficiency and expanding production capacity in Chilean sawmills. Output of temperate hardwood plywood and veneer has been trending upward over the past several years, but at a much slower rate than other solid wood products, due to slack domestic and export demand. Hardboard production has remained static at 52,000 CUM since 1989 because Chilean plants lack the additional capacity to increase production. No expansion in production capacity is expected in the near future. Production of particleboard slowed during 1990 as Chile's largest plant shut down to expand production capacity and retool with more efficient machinery. Production is expected to rebound to 185,000 tons in 1991, and rise an additional 15-20 percent in 1992. Growth potential of the medium density fiberboard sector remains strong. The opening of a new medium density fiberboard plant in late 1990 boosted 1991 production by 53 percent, to a record 95,000 CUM. Another plant scheduled to come on line in early 1992 will increase the sector's annual production capacity to 200,000 CUM.

MEXICO: Productivity within the Mexican forestry sector continues to decline. The outlook for 1991 projects reduced fellings of softwood and tropical hardwood logs and smaller output of all wood products. Only fellings of temperate hardwood logs are expected to increase during 1991--a reflection of higher demand for fuelwood.

VENEZUELA: Current assessments point to another difficult year for the Venezuelan forest products industry. The construction sector, Venezuela's largest consumer of wood products, remains paralyzed as interest rates hover around 40 percent. The furniture industry is in a slump as rampant inflation pushes non-essential items out of the reach of most consumers. However, the outlook for 1991 is not totally bleak. Fellings of softwood logs are projected to increase 4 percent, to 130,000 CUM, in order to meet rising demand from pulp plants. Expanding sawmill capacity and the opening of several new plywood facilities are expected to moderately increase production of both softwood lumber and plywood. Further growth in the production of softwood products is envisioned next year as concessionaires begin cutting new plantation stands of Caribbean pines, and on-going investments to vertically integrate and upgrade operations in sawmills and plywood plants improve the competitiveness of Venezuelan products.

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TABLE 20

LATIN AMERICA: FORESTRY PRODUCTION IN SELECTED COUNTRIES  
(1,000 Cubic Meters)

<u>BRAZIL:</u>	<u>1987</u>	<u>1988</u>	<u>1989</u>	<u>1990</u>	<u>1991</u>	<u>1/</u>
<u>HARVEST</u>	79,700	81,700	81,000	78,000	78,000	
Softwood Logs	16,000	16,200	16,500	15,500	15,500	
Tropical Hardwood Logs	34,000	34,500	35,000	33,000	33,000	
Poles/Piles/Posts/Pitprops	5,500	6,000	6,500	6,000	6,000	
Softwood Lumber	1,900	2,100	3,200	2,900	2,900	
Tropical Hardwood Lumber	8,200	8,300	9,000	8,500	8,500	
Railroad Ties/Sleepers	110	120	130	120	120	
Tropical Hardwood Veneer	230	250	255	213	205	
Softwood Plywood	400	280	290	240	215	
Tropical Hardwood Plywood	1,200	1,270	1,160	960	865	
Hardboard	780	610	527	475	460	
Particleboard	680	900	682	490	460	
 <u>CHILE:</u>	 <u>1987</u>	 <u>1988</u>	 <u>1989</u>	 <u>1990</u>	 <u>1991</u>	 <u>1/</u>
<u>HARVEST</u>	13,320	14,380	15,700	16,500	18,200	
Softwood Logs	6,097	7,300	6,300	7,200	8,200	
Softwood Lumber	2,310	2,380	2,320	2,870	3,100	
Temperate Hardwood Plywood	29	33	37	40	42	
Temperate Hardwood Veneer	5	5	6	8	8	
Hardboard	45	46	52	52	52	
Medium Density Fiberboard	0	2	17	62	95	
Particleboard	172	175	190	178	185	
 <u>MEXICO:</u>	 <u>1987</u>	 <u>1988</u>	 <u>1989</u>	 <u>1990</u>	 <u>1991</u>	 <u>1/</u>
<u>HARVEST</u>	9,791	9,314	8,888	8,102	7,834	
Softwood Logs	8,306	7,859	7,649	6,987	6,826	
Temperate Hardwood Logs	387	459	430	361	366	
Tropical Hardwood Logs	948	832	653	533	510	
Poles/Piles/Posts/Pitprops	150	164	156	139	132	
Softwood Lumber	2,550	2,505	2,600	2,498	2,420	
Temperate Hardwood Lumber	77	80	83	80	76	
Tropical Hardwood Lumber	92	110	86	84	75	
Railroad Ties/Sleepers	349	225	134	82	80	
Softwood Plywood	229	183	148	132	125	
Hardwood Plywood	57	46	36	25	23	
Hardboard	63	25	20	31	30	
Medium Density Fiberboard	28	26	25	8	7	
Particleboard	423	436	414	352	338	
 <u>VENEZUELA:</u>	 <u>1987</u>	 <u>1988</u>	 <u>1989</u>	 <u>1990</u>	 <u>1991</u>	 <u>1/</u>
<u>HARVEST</u>	580	976	639	555	500	
Softwood Logs	330	260	194	125	130	
Tropical Hardwood Logs	250	716	444	430	370	
Softwood Lumber	125	156	122	75	78	
Tropical Hardwood Lumber	75	325	213	206	195	
Softwood Plywood	33	33	21	16	18	
Tropical Hardwood Plywood	19	20	12	9	9	

1/ Preliminary.

## OCEANIA FORESTRY SITUATION

AUSTRALIA: Following last year's sharp decline in productivity, Australia's output of wood and wood products is expected to show moderate gains during 1991. The turnaround reflects a modest improvement in the economic climate generated by falling interest rates.

The 1991 timber cut is forecast at 17.1 million cubic meters (CUM), a 5 percent increase from 1990. A similar percentage increase is anticipated in softwood log fellings -- from approximately 5.8 million CUM in 1990 to nearly 6.1 CUM in 1991. Softwood logs account for approximately 36 percent of Australia's 1991 harvest, up from 24 percent in 1979. This increase reflects the expansion in softwood plantation areas that has occurred over the past several decades. The level of activity in the construction industry is the leading determinant of softwood lumber production. The decline in interest rates -- from 15.5 percent in early 1990 to the current rate of 12.5 percent -- reportedly has spurred some activity in the housing sector, but less than would normally be expected, due to a general lack of confidence in the economy and a high unemployment rate. Consequently, production of softwood lumber is forecast at 1.4 million, only 2 percent greater than a year ago.

Production prospects are mixed in the panel products sector. Plywood production is expected to plummet 15 percent to 86,000 CUM, potentially the lowest level since 1983. Historically, the bulk of Australia's plywood production consisted of quality hardwoods for decorative applications. However, declining access to mature hardwood stands forced the closure of many plywood plants that specialized in the production of decorative plywood. Today, only about 30 percent of Australia's plywood is manufactured from hardwoods. The remainder is made from plantation softwoods. The substitution of softwoods for hardwoods necessitated a diversification of the end-uses of plywood -- from decorative applications to structural and construction uses. Since most structural plywood is consumed by the non-residential construction market, the continuing slump in this market accounts for the sharp decline in plywood production forecast for 1991.

Australia's production of all board products is expected to increase in 1991. The largest percentage gain -- 12 percent over last year -- is projected for medium density fiberboard whose strong growth potential lies in its versatility as both a building and furniture grade product.

NEW ZEALAND: Current assessments indicate that New Zealand's 1991 timber harvest will reach a record 13.5 million CUM, up 3 percent from a year ago. The increase reflects strong international demand for softwood logs and medium density fiberboard. The long-term outlook is for further increases in fellings, but at a much slower rate. For the past several years, afforestation and reforestation efforts have lagged significantly behind the rate of removals. In 1990, only about 12,000 hectares were replanted compared to 48,000 hectares in 1986. The main reason for the decline in plantings was the government's decision to discontinue tax deductions for planting costs. The government has recently reversed this decision as an impetus to spur new plantings.



Strong foreign demand for softwood logs is expected to boost 1991 production to a record 8.1 million CUM, a 10 percent increase over the 1990 level. Softwood lumber should keep trending upward in response to expanding exports, but production prospects will be tempered by static domestic demand and rising log prices.

Medium density fiberboard is the growth industry in the panel products sector. Production has increased steadily since 1982, and expectations are that output in 1991 will reach a record 480,000 CUM. Production levels for plywood, veneer, and particleboard are determined primarily by the state of the domestic market. The general slowdown in the economy, coupled with recession in the construction industry, is expected to moderately reduce 1991 output of these products.

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TABLE 21

OCEANIA FORESTRY PRODUCTION  
(1,000 Cubic Meters)

<u>AUSTRALIA:</u>	<u>1987</u>	<u>1988</u>	<u>1989</u>	<u>1990</u>	<u>1991 1/</u>
<u>HARVEST</u>	17,460	17,628	16,500	16,250	17,120
Softwood Logs	6,090	6,153	6,100	5,769	6,078
Poles/Piles/Posts/Pitprops	400	271	250	250	250
Softwood Lumber	1,307	1,644	1,536	1,425	1,454
Railroad Ties/Sleepers	150	140	123	125	126
Plywood	111	130	125	101	86
Hardboard	117	130	112	99	101
Medium Density Fiberboard	100	122	191	203	227
Insulation Board	12	11	11	13	14
Particleboard	715	779	743	614	620
<u>NEW ZEALAND:</u>	<u>1987</u>	<u>1988</u>	<u>1989</u>	<u>1990</u>	<u>1991 1/</u>
<u>HARVEST</u>	9,046	10,200	11,644	13,105	13,500
Softwood Logs	4,957	5,676	6,080	7,365	8,109
Poles/Piles/Posts/Pitprops	171	165	190	205	216
Softwood Lumber	1,837	1,842	2,096	2,156	2,260
Softwood Plywood	60	61	67	67	65
Softwood Veneer	83	77	86	82	79
Medium Density Fiberboard	294	392	431	462	480
Particleboard	183	175	169	161	155

1/ Preliminary.

November 1991      Production Estimates and Crop Assessment Division, FAS, USDA



## DAIRY PRODUCTION IN SELECTED COUNTRIES

Cow milk production for selected countries for 1991 is forecast at 427 million tons, down 4 percent, reversing a pattern of steady growth. Another small decline is forecast for 1992. Declines in both years largely reflect the unfavorable conditions faced by milk producers in the Soviet Union. Besides the Soviet Union, 1991 output is also expected to be down in Brazil, in the EC, particularly Germany, and in the eastern European countries. Mexico and China are expected to show significant increases in milk production.

Since milk production in these selected countries is down, production of most of the major dairy products is forecast to decline. Output of butter in 1991 is forecast at 6.52 million tons, 4 percent below 1990. A further decline is forecast for 1992. Output of cheese, forecast at 10.9 million tons in 1991, is essentially unchanged from 1990. Growth of 1 percent is forecast for 1992. Nonfat dry milk (NDM) output is forecast to total 3.31 million tons in 1991, down 7 percent from 1990. Most of the decline is expected in the EC. In 1992 NDM production is forecast to decline at about the same rate as in 1991. Casein output is forecast at 204,000 tons in 1991, down 8 percent, and at 208,000 tons for 1992.

Milk production for the United States in 1991 is forecast at 67.4 million tons, slightly above 1990 production of 67.3 million tons. The number of milk cows is down 1 percent with a similar rate of decline forecast for 1992. U.S. milk output in 1992 is forecast to show a small increase. In Canada, another cut in the quota for processing milk deliveries is the main cause of the forecast decline in cow numbers and milk production. Continuing decreases in demand for butterfat, reflected both by declining butter production and increased consumption of lowfat milk, is the reason for the cut in the manufacturing quota. Mexico's 1991 milk output is now forecast at 10.2 million tons, 9 percent above 1990. Abundant rainfall in the northern and central regions of the country and increased production in the tropical south boosted 1991 output. Favorable demand prospects due to recovery of the domestic economy are forecast to provide sufficient incentive to increase output again in 1992. Continued imports of dairy cattle, mostly from the United States, have facilitated a further increase in the milk cow herd.

Cow milk production in Brazil is forecast to contract 5 percent in 1991 as the impact of a prolonged dry season has been compounded by low prices. Output should increase in 1992 if, as many producers expect, milk prices are decontrolled and if more normal patterns of weather prevail. Argentina's 1991 milk output, forecast at 6.2 million tons, is down 3 percent reflecting very tight margins that are forcing both producers and processors out of business. Some price recovery is forecast for 1992 as milk is currently in short supply. Favorable milk prices in Chile are forecast to stimulate production increases in 1991 and 1992; however, improved beef prices likely will induce some farmers to consider expanding beef production rather than dairy during 1992. Venezuela's 1991 milk production is forecast to decline again as producers continue adjusting to sharply higher feed costs arising from the removal of foreign exchange subsidies. Though details have not been announced as of yet, a new dairy policy for 1992 and beyond is expected to bring some price relief.

Forecasts of milk production in 1991 and 1992 in the EC are down from recent years, largely due to smaller quotas and the German situation. Output in Germany is forecast at 29.8 million tons in 1991, 4 percent below the 1990 level as the eastern region adapts to market conditions and EC quotas. Dairy cow numbers in the eastern states were down over 30 percent, pulling the 1991 average for all Germany down 12 percent. French milk production in 1991 is forecast at 26.3 million tons, less than 1 percent below last year's level despite a 2 percent cut in the EC quota. Milk output in Italy is forecast at 11.2 million tons, nearly 3 percent below the revised 1990 level. The Government of Italy is now subtracting super levy payments (for over-quota production) directly from the payments to farmers rather than allowing farmers to defer payment as was done in the past. To help the industry stay within the national quota, the Government of Italy has implemented a program to take an extra 100,000 cows out of production. Milk output in the United Kingdom and the Netherlands during 1991 are each forecast down about 2 percent in response to the 2 percent cut in the EC quota. Quotas for individual producers in these two countries were cut more than 2 percent because of adjustments for higher fat content of the milk and because of within country reallocations. Milk output in Spain and Portugal, where the quota system became fully effective in 1991, is forecast to decline in Spain while growth will slow in Portugal.

Milk production in Eastern Europe is expected to decline 6 percent in 1991. Weak domestic demand for milk and milk products is the major problem. Barring a major turn-around in the region's economy, a 3 percent decline is forecast for 1992 as the lack of profitability drives small producers out of business. In the Soviet Union, milk output for 1991 is forecast at 98 million tons, nearly 10 percent below 1990. Another decline is forecast for 1992. Short supplies of forage and grain for feed and problems in the general economy are taking a severe toll on the dairy sector.

Milk production in Japan in 1991 is largely unchanged from the 1990 level. Production costs have been declining but the support price for manufacturing milk has also declined. A 1 percent increase in production is forecast for 1992 as current shortages have increased prospects for more favorable prices. Following a favorable 1990 season, India's 1991 output is forecast to remain at the 1990 level. The delayed monsoon in northern and western states appears to have reduced forage availability and thereby milk yields. Higher prices resulting from the forage shortages could bring a production increase in 1992. Favorable feed prices and government encouragement for the industry are expected to boost China's 1991 milk production by 8 percent, to 4.5 million tons. A similar rate of growth is forecast for 1992.

Australia's 1991 milk production totaled 6.6 million tons, up 2 percent from 1990. Victoria, the major dairy province, and Tasmania experienced unusually favorable summer and fall pasture conditions. A decline of about 2 percent is forecast for 1992 as dairy sector profitability has fallen and dry conditions are affecting some dairy areas. New Zealand's 1991 (June 1990-May 1991) production was up 3 percent. The first 6 months of the year were characterized by extremely favorable pasture growing conditions. Output for 1992 is forecast at 8.1 million tons, up 2 percent as farmers, responding to a more optimistic outlook, have increased their dairy herds. The initial payment for the 1991/92 year was NZ\$3.70 per kilogram of milk fat, the same as last year's final payout. Many analysts think this year's final Dairy Board payout will be above NZ\$4.00. In addition, many processors pay a bonus on top of the Dairy Board payout.



Butter production in selected countries is forecast to total 6.5 million tons in 1991, 4 percent below the 1990 level. Production in 1992 is forecast to decline another 3 percent. Butter production in 1991 in the United States is forecast at 625,000 tons, up 6 percent with much of the increase due to the government support program. A 10 percent decline is forecast for 1992 as surplus milk supplies decline and output of cheese rebounds. After 3 years of relatively stable production, EC output of butter in 1991 is forecast to fall nearly 10 percent. Most of the decline is occurring in Germany where many consumers in the eastern region are switching to margarine as it becomes more available. Reduced milk manufacturing supplies resulted in cuts in butter production in the traditional exporting countries of Denmark, France, and the Netherlands. In Eastern Europe, 1991 butter production is forecast down nearly 10 percent reflecting smaller milk supplies and weaker domestic demand. With reduced milk supplies and distribution problems with the milk that is available, butter production in the USSR is forecast to show an 8 percent decline in 1991. A further decline is likely in 1992. New Zealand's output of butter was 269,000 tons in 1991, down 3 percent from 1990. Improved export prospects for whole milk powder was the major factor behind the decline.

Cheese production in selected countries for 1991 is forecast at 10.9 million tons, essentially unchanged from 1990. Growth of about 1 percent is forecast for 1992. U.S. cheese production in 1991 is forecast down about 2 percent. Demand for cheese weakened in response to economic conditions. Renewed production growth is forecast for 1992. Cheese output in the EC, after stagnating in 1990, is forecast to grow 2 percent in 1991 and stay near that level in 1992. Output in France and the Netherlands is expected to reach new records in 1991 based on continued growth in domestic and export utilization. German production is rebounding after last year's sharp decline following reunification. Current production surpluses in the UK and Italy may cause production declines in 1992. Cheese output in New Zealand was up in 1991 as some manufacturing milk was diverted from butter manufacture to cheese production. Further growth in cheese output is expected in 1992.

Output of nonfat dry milk (NDM) in selected countries in 1991 is forecast down about 7 percent, despite a 6 percent increase in U.S. output. EC production is forecast to decline about 9 percent due mainly to declines in France, the UK, and Ireland. Output in these three countries was unexpectedly higher last year. Production of NDM in New Zealand is estimated down nearly a one-fifth in 1991 as export markets for whole dried milk have been relatively more favorable. Another decline in NDM output is forecast for 1992.

Casein production in selected countries is forecast at 204,000 tons in 1991, down 8 percent from 1990. A 2 percent increase is forecast for 1992. EC production is forecast to decline about 7 percent in 1991 as producers continue to react to the reduced production subsidy and to poor export prospects. Casein output in New Zealand stabilized in 1991 and may increase a little in 1992 in line with the increase in milk production.

TABLE 22

MILK COW NUMBERS IN SELECTED COUNTRIES  
(1,000 head)

<u>COUNTRY/REGION</u>	<u>1987</u>	<u>1988</u>	<u>1989</u>	<u>1990</u> <u>1/</u>	<u>1991</u> <u>2/</u>	<u>1992</u> <u>2/</u>
Canada	1,481	1,467	1,449	1,429	1,410	1,390
Mexico	6,300	6,200	6,300	6,410	6,440	6,470
United States	10,327	10,262	10,126	10,127	10,015	9,893
NORTH AMERICA	18,108	17,929	17,875	17,966	17,865	17,753
Argentina	2,400	2,360	2,150	2,000	1,950	1,950
Brazil	14,700	14,700	14,650	15,100	15,500	15,200
Chile	600	630	640	645	640	635
Peru	700	703	685	620	625	630
Venezuela	1,298	1,300	1,210	1,170	1,150	1,110
SOUTH AMERICA	19,698	19,693	19,335	19,535	19,865	19,525
Bel-Lux	984	954	930	926	893	865
Denmark	811	774	764	770	769	765
France	6,359	5,841	5,574	5,489	5,400	5,350
Germany	7,322	7,071	6,960	6,680	5,900	5,700
Greece	233	232	226	242	245	235
Ireland	1,490	1,444	1,387	1,400	1,380	1,370
Italy	3,021	3,020	2,973	2,925	2,924	2,750
Netherlands	2,043	1,946	1,888	1,855	1,840	1,830
Portugal	388	402	414	398	403	405
Spain	1,890	1,882	1,880	1,834	1,586	1,500
United Kingdom	3,311	3,166	3,142	3,220	3,207	3,159
EC-12	27,852	26,732	26,138	25,739	24,547	23,929
Austria	976	891	887	883	880	876
Finland	580	535	509	492	443	430
Norway	357	346	343	340	340	340
Sweden	576	565	560	555	508	478
Switzerland	790	786	795	785	784	784
OTHER WEST EUROPE	3,279	3,123	3,094	3,055	2,955	2,908
Czechoslovakia	1,791	1,788	1,812	1,761	1,650	1,600
Hungary	585	578	580	570	545	505
Poland	4,937	4,806	4,994	4,900	4,707	4,500
Romania	2,111	2,075	2,030	1,990	1,600	1,500
Yugoslavia	2,610	2,585	2,516	2,480	2,425	2,470
EAST EUROPE	12,034	11,832	11,932	11,701	10,927	10,575
USSR	42,400	42,000	41,809	41,734	41,000	40,500
SOUTH AFRICA	1,985	1,814	1,870	1,763	1,775	1,780
India	28,500	28,500	29,000	32,100	31,000	32,500
China	1,846	2,164	2,222	2,691	2,800	2,900
Japan	1,052	1,046	1,066	1,081	1,081	1,085
ASIA	31,398	31,710	32,288	35,872	34,881	36,485
Australia 3/	1,707	1,697	1,663	1,631	1,595	1,555
New Zealand 4/	2,252	2,280	2,236	2,269	2,300	2,300
OCEANIA	3,959	3,977	3,899	3,900	3,895	3,855
WORLD	160,713	158,810	158,240	161,265	157,710	157,310

1/ Preliminary. 2/ Forecast. 3/ Year beginning July 1.  
4/ Year beginning June 1.



TABLE 23

COW MILK PRODUCTION IN SELECTED COUNTRIES  
(1,000 metric tons)

<u>COUNTRY/REGION</u>	<u>1987</u>	<u>1988</u>	<u>1989</u>	<u>1990</u> <u>1/</u>	<u>1991</u> <u>2/</u>	<u>1992</u> <u>2/</u>
Canada	7,986	8,229	7,980	7,975	7,950	7,900
Mexico	8,971	8,830	8,970	9,330	10,200	10,700
United States	64,732	65,840	65,424	67,259	67,420	67,560
NORTH AMERICA	81,689	82,899	82,374	84,564	85,570	86,160
Argentina	6,582	6,168	6,725	6,400	6,200	6,300
Brazil	13,300	13,200	13,400	14,500	13,800	14,800
Chile	1,133	1,154	1,270	1,420	1,490	1,560
Peru	655	668	652	565	600	630
Venezuela	1,641	1,796	1,688	1,662	1,591	1,540
SOUTH AMERICA	23,311	22,986	23,735	24,547	23,681	24,830
Bel-Lux	4,074	3,915	3,917	3,901	3,816	3,700
Denmark	4,860	4,739	4,747	4,742	4,640	4,640
France	27,146	26,000	26,150	26,400	26,300	26,250
Germany	32,400	32,000	32,400	31,200	29,800	29,400
Greece	628	652	675	735	738	715
Ireland	5,751	5,573	5,575	5,623	5,568	5,512
Italy	10,300	10,671	10,828	11,491	11,200	11,000
Netherlands	11,672	11,406	11,321	11,285	11,130	11,250
Portugal	1,253	1,346	1,420	1,519	1,550	1,580
Spain	5,941	5,950	6,000	6,200	6,100	5,950
United Kingdom	15,360	14,880	14,647	14,961	14,635	14,490
EC-12	119,385	117,132	117,680	118,057	115,477	114,487
Austria	3,687	3,320	3,318	3,315	3,300	3,300
Finland	2,938	2,721	2,729	2,752	2,442	2,363
Norway	1,961	1,908	1,903	1,900	1,900	1,900
Sweden	3,477	3,445	3,420	3,520	3,242	3,110
Switzerland	3,768	3,768	3,889	3,843	3,850	3,845
OTHER WEST EUROPE	15,831	15,162	15,259	15,330	14,734	14,518
Czechoslovakia	6,921	6,963	7,031	6,861	6,400	6,200
Hungary	2,770	2,788	2,840	2,743	2,625	2,475
Poland	15,467	15,450	16,371	15,801	15,000	14,300
Romania	4,275	4,300	4,150	4,775	4,100	4,050
Yugoslavia	4,736	4,629	4,599	4,500	4,450	4,500
EAST EUROPE	34,169	34,130	34,991	34,680	32,575	31,525
USSR	103,400	106,800	108,529	108,700	98,000	95,000
SOUTH AFRICA	2,410	2,450	2,557	2,503	2,509	2,515
India	21,200	22,000	24,000	27,500	27,000	28,500
China	3,301	3,660	3,813	4,157	4,500	4,800
Japan	7,335	7,607	8,059	8,190	8,180	8,250
ASIA	31,836	33,267	35,872	39,847	39,680	41,550
Australia <u>3/</u>	6,367	6,297	6,465	6,435	6,578	6,474
New Zealand <u>4/</u>	7,245	7,936	7,406	7,746	7,973	8,119
OCEANIA	13,612	14,233	13,871	14,181	14,551	14,593
GRAND TOTAL	425,643	429,059	434,868	442,409	426,777	425,178

1/ Preliminary. 2/ Forecast. 3/ Year beginning July 1.

4/ Year beginning June 1.

TABLE 24

BUTTER PRODUCTION IN SELECTED COUNTRIES  
(1,000 metric tons)

<u>COUNTRY/REGION</u>	<u>1987</u>	<u>1988</u>	<u>1989</u>	<u>1990</u> <u>1/</u>	<u>1991</u> <u>2/</u>	<u>1992</u> <u>2/</u>
Canada	95	105	99	97	100	100
Mexico	26	32	33	34	34	35
United States	501	547	588	591	625	560
NORTH AMERICA	622	684	720	722	759	695
Argentina	34	35	45	40	38	40
Brazil	65	65	65	75	70	75
Venezuela	5	4	2	3	3	3
SOUTH AMERICA	104	104	112	118	111	118
Bel-Lux	94	81	89	87	85	85
Denmark	96	94	92	93	72	70
France	569	521	518	527	500	500
Germany	786	700	711	640	533	530
Greece	5	5	6	6	7	7
Ireland	150	139	156	149	146	138
Italy	70	71	74	80	80	75
Netherlands	234	214	213	209	198	175
Portugal	8	10	12	15	17	19
Spain	29	27	30	46	43	35
United Kingdom	174	140	130	130	120	125
EC-12	2,215	2,002	2,031	1,982	1,801	1,759
Austria	41	42	41	40	42	42
Finland	68	61	63	63	54	52
Norway	25	23	26	29	26	26
Sweden	64	61	70	78	65	60
Switzerland	34	35	39	38	37	37
OTHER WEST EUROPE	232	222	239	248	224	217
Czechoslovakia	149	148	156	159	150	145
Hungary	33	35	38	38	29	26
Poland	290	293	325	315	285	300
Romania	42	40	46	42	43	40
Yugoslavia	8	8	12	11	8	9
EAST EUROPE	522	524	577	565	515	520
USSR	1,742	1,724	1,726	1,730	1,600	1,550
SOUTH AFRICA	11	15	16	21	18	18
India	750	850	880	970	1,040	1,020
Japan	69	68	78	76	70	76
ASIA	819	918	958	1,046	1,110	1,096
Australia <u>3/</u>	104	98	96	111	114	111
New Zealand <u>4/</u>	248	276	246	276	269	267
OCEANIA	352	374	342	387	383	378
GRAND TOTAL	6,619	6,567	6,721	6,819	6,521	6,351

1/ Preliminary. 2/ Forecast. 3/ Year beginning July 1.  
4/ Year beginning June 1.

November 1991

Production Estimates and Crop Assessment Division, FAS, USDA



TABLE 25

CHEESE PRODUCTION IN SELECTED COUNTRIES  
(1,000 metric tons)

<u>COUNTRY/REGION</u>	<u>1987</u>	<u>1988</u>	<u>1989</u>	<u>1990</u>	<u>1/</u>	<u>1991</u>	<u>2/</u>	<u>1992</u>	<u>2/</u>
Canada	246	252	247	250		255		250	
Mexico	298	370	373	384		395		400	
United States	2,424	2,527	2,546	2,749		2,695		2,885	
NORTH AMERICA	2,968	3,149	3,166	3,383		3,345		3,535	
Argentina	277	265	260	270		280		280	
Brazil	195	200	220	200		220		220	
Venezuela	82	96	94	96		92		90	
SOUTH AMERICA	554	561	574	566		592		590	
Bel-Lux	35	37	38	42		41		41	
Denmark	271	258	275	293		283		288	
France	1,342	1,378	1,485	1,490		1,510		1,520	
Germany	817	849	885	749		830		840	
Greece	197	203	210	200		210		205	
Ireland	65	75	74	76		69		70	
Italy	704	737	760	811		810		780	
Netherlands	552	559	568	593		613		600	
Portugal	47	44	55	49		49		48	
Spain	113	120	123	133		140		150	
United Kingdom	263	299	280	316		295		278	
EC-12	4,406	4,559	4,753	4,752		4,850		4,820	
Austria	78	84	88	87		85		84	
Finland	78	75	78	81		73		72	
Norway	75	74	76	76		76		76	
Sweden	107	115	109	108		107		109	
Switzerland	128	134	137	138		139		140	
OTHER WEST EUROPE	466	482	488	490		480		481	
Czechoslovakia	142	146	152	150		140		135	
Hungary	52	54	54	64		58		58	
Poland	123	133	130	126		125		125	
Romania	86	84	82	87		95		90	
Yugoslavia	48	54	56	52		45		48	
EAST EUROPE	451	471	474	479		463		456	
USSR	861	894	900	881		800		770	
SOUTH AFRICA	44	43	48	48		46		47	
JAPAN	25	26	27	28		29		30	
Australia 3/	177	176	190	175		176		180	
New Zealand 4/	113	128	128	122		125		129	
OCEANIA	290	304	318	297		301		309	
GRAND TOTAL	10,065	10,489	10,748	10,924		10,906		11,038	

1/ Preliminary. 2/ Forecast 3/ Year beginning July 1.  
4/ Year beginning June 1.

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Production Estimates and Crop Assessment Division, FAS, USDA



TABLE 26

NONFAT DRY MILK PRODUCTION IN SELECTED COUNTRIES  
(1,000 metric tons)

<u>COUNTRY/REGION</u>	<u>1987</u>	<u>1988</u>	<u>1989</u>	<u>1990</u>	<u>1/</u>	<u>1991</u>	<u>2/</u>	<u>1992</u>	<u>2/</u>
Canada	110	110	93	95		93		91	
Mexico	4	5	6	9		9		9	
United States	480	444	397	398		420		350	
NORTH AMERICA	594	559	496	502		522		450	
Argentina	13	22	45	34		26		26	
Brazil	30	40	50	60		55		60	
Chile	4	4	4	5		5		5	
Venezuela	12	4	2	2		2		3	
SOUTH AMERICA	59	70	101	101		88		94	
Bel-Lux	99	83	98	94		95		96	
Denmark	18	7	13	41		17		15	
France	603	490	492	580		500		500	
Germany	526	446	500	509		520		450	
Ireland	129	100	140	195		182		160	
Italy	0	1	0	0		0		0	
Netherlands	98	87	83	70		53		50	
Portugal	8	9	10	15		17		19	
Spain	39	29	31	46		43		30	
United Kingdom	193	136	133	166		142		131	
EC-12	1,713	1,388	1,500	1,716		1,569		1,451	
Austria	28	23	21	24		26		25	
Finland	39	28	26	22		15		15	
Sweden	46	36	48	51		29		20	
Switzerland	23	36	33	32		31		31	
OTHER WEST EUROPE	136	123	128	129		101		91	
Poland	156	159	174	175		160		150	
Yugoslavia	6	10	11	10		8		9	
EAST EUROPE	162	169	185	185		168		159	
USSR	310	350	300	300		280		260	
SOUTH AFRICA	12	19	20	26		21		20	
India	54	80	90	72		65		75	
Japan	153	159	178	179		170		176	
ASIA	207	239	268	251		235		251	
Australia 3/	128	120	127	144		155		151	
New Zealand 4/	173	198	181	208		171		165	
OCEANA	301	318	308	352		326		316	
GRAND TOTAL	3,494	3,235	3,306	3,562		3,310		3,092	

1/ Preliminary. 2/ Forecast. 3/ Year beginning July 1.

4/ Year beginning June 1.

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Production Estimates and Crop Assessment Division, FAS, USDA



TABLE 27

CASEIN PRODUCTION IN SELECTED COUNTRIES  
(1,000 metric tons)

<u>COUNTRY/REGION</u>	<u>1987</u>	<u>1988</u>	<u>1989</u>	<u>1990</u>	<u>1/</u>	<u>1991</u>	<u>2/</u>	<u>1992</u>	<u>2/</u>
Denmark	17	21	19	13		16		16	
France	52	61	47	26		25		25	
Germany	25	25	22	16		18		18	
Ireland	39	44	32	28		27		28	
Netherlands	20	20	20	30		20		18	
United Kingdom	1	0	1	2		1		1	
EC-12	154	171	141	115		107		106	
 POLAND	 22	 24	 33	 38		 30		 33	
 Australia	 8	 9	 7	 5		 3		 3	
New Zealand	62	66	56	64		64		66	
OCEANIA	70	75	63	69		67		69	
 GRAND TOTAL	 246	 270	 237	 222		 204		 208	

1/ Preliminary. 2/ Forecast. 3/ Year beginning July 1.  
4/ Year beginning June 1.

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